

China Orthopedics Implants Medical Devices Market Brief

By: PIM LTD.
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Definition and Classification^{1,2}

Orthopedics implants medical devices are the clinical orthopedic medical materials used for human skeleton replacing, supporting and repairing. Commonly, there are three main types: joint, spinal and trauma products.

Joints Products

- Shoulder system
- Elbow system
- Hip system
 - Tissue-sparing
 - Resurfacing
 - Femoral stem
 - Revision system
- Upper extremities
- Limb salvage
- Knee system
 - Primary total knee
 - System
 - Patient specific
 - Revision knee

Spinal Products

- Spinal fixator
 - Pedicle screw
 - Coupling device
- Anterior cervical/Thoracic/ Lumbar vertebra fixation system
 - Bone plate splint
 - Screw
- Posterior cervical fixation system
 - Steering pin
 - Cervical spine Locking plate
 - Coupling device

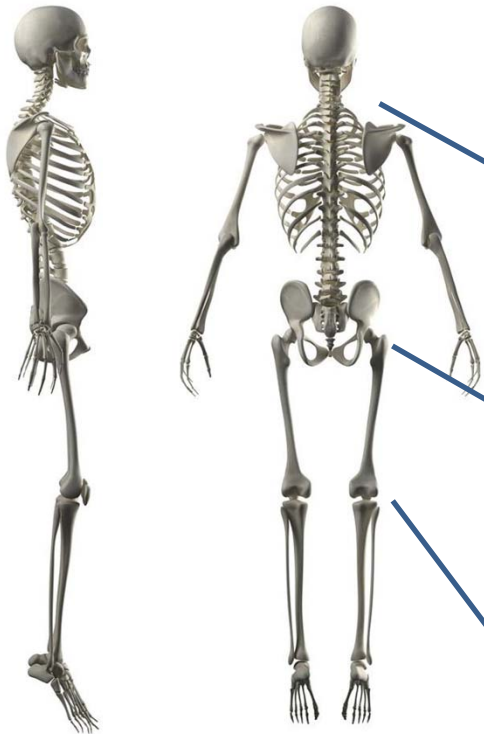
Trauma Products

- Bone plate splint
 - T-Shaped bone plate
 - Golf club-like shape bone plate
 - L-Shaped bone plate
- Bone remodeling plate
- Hollow rivet
- Screw
- Bone nail
- Dynamic hip screw

Source: 1. China Association for Medical Devices Industry
2. PIM Research and analysis

Demand Growth^{1,2,3}

Number of orthopedic patients in China is on the rise



- Number of osteoporosis patients in China is estimated to increase to 0.2866 billion in 2020.

- By 2016, China had over 0.2 billion patients with cervical syndromes and had spent around ¥0.5 billion on it.

- Number of osteoporotic hip fracture patients in China is projected to be 1.6382 millions in 2020.

- The index on Chinese knee-joint health is only 64.7 points and nearly 30% are less than 60 points out of 100 in 2017

Source:
1. 2017 BY-HEALTH National Health Report
2. PIM Research and analysis
3. Chinese Journal of Joint Surgery 2014, (3)

Government Policies^{1,2}

- **13th Five-Year Science and Technology Innovation Planning**

- At present, the research and application should also focus on bone-like implants and implant devices aspect
- In the aspect of strategic layout, the new generation of implants medical devices, artificial organs tissue engineered medical products and tissue induced biomedical materials should be key development part.

- **Subject plan for the 12th Five-year Plan of the Medical Device Technology Industry**

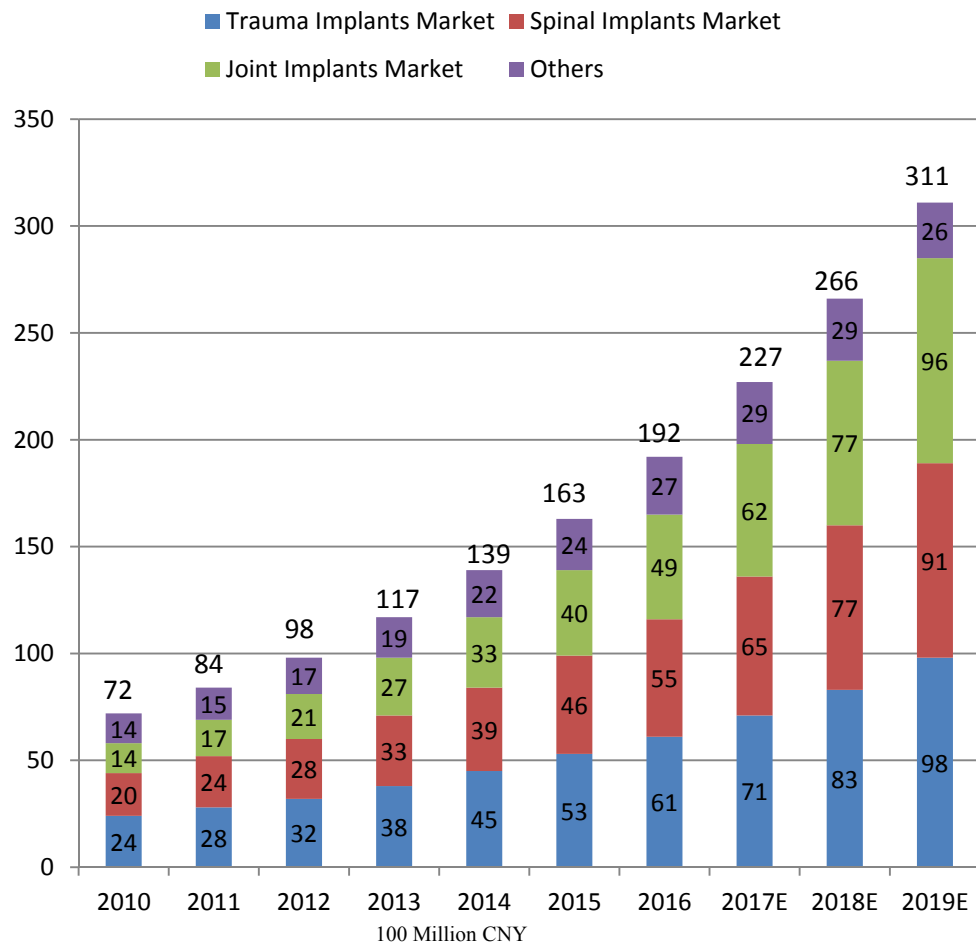
- Orthopedics implants products, are listed as national key products development
- Beef up the spread and application of high-and-mid-end and main popular medical device, intravascular stent and artificial joint that depends on importing

- **The 13th Five-Year Plan**

- High performance medical devices, like high-value medical consumables and diagnostic imaging equipment will be the focus of policy support in the future

Source: 1.Ministry of Science and Technology of the PRC
2. Pharmnet.com.cn
3. www.Sohou.com

Market Shares on Orthopedics Implants Medical Devices^{1,2}



Source: 1.PIM research and analysis, August 2017
 2.www.chyxx.com
 3. * Others= Sports Medicine + Neurosurgery

- In overall market, the China Orthopedics Implants Medical Devices keep increasing and is estimated to be ¥31.1 billions in 2019
- Every specific orthopedics implants medical devices market is witnessing the increasing situation
- Trauma Implants Market is always the largest market section from the year 2010 to 2019E
- The Joint Implants Market grows quicker than the others (Average grow rate of it is more than 20%)

Leading Brands^{1,2}

Worldwide Orthopedics Sales, Market Share & Sales Growth of Leading Brands (2015~2022E)* :
J&J and Zimmer Biomet are the leading companies in Orthopedics in 2022 with Zimmer Biomet set to experience strong growth



Source:

1. EvaluateMedTech
2. PIM Research and analysis

Note:

* Bubble size = worldwide sales in 2022

Thank you!

谢谢!



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