Orthopedic Braces & Supports Market by Product (Knee Braces, Foot & Ankle Braces, Spinal Orthoses, Upper Extremity Braces), by End User (Orthopedic Clinics, Over the Counter, Hospitals and Others), by Geography - Global Forecast to 2020

Description: Orthopedic braces and supports are devices that are used to support and strengthen muscles and joints. These are used in prophylaxis of injury and patient care settings, right from the emergency room through the hospitalization period to rehabilitation and after care. Ligament injuries are one of the most common injuries in any sport; thus, braces and support systems are used to treat knee & ankle sprains, torn knee ligaments, and so on.

The growing demand for orthopedic support system can be attributed to a number of factors, such as the rising aging population, rising awareness about the orthopedic support systems among the people, and increasing cases of road accidents and sports injuries and co-morbid conditions leading to orthopedic disorders or diseases.

Sports injuries are one of the key drivers for the foot & ankle braces & supports segment of the market. According to recent studies, several sports research academies have observed an increasing number of serious bone injuries among professional as well as amateur sportspersons. The incidence rate of ligament tears and fractures is high and foot & ankle injuries in sports constitute over 20.0% of the total sports injuries. Furthermore, co-morbid conditions, such as diabetes, obesity, and other vascular diseases lead to bone porosity, which poses high risk of bone fractures.

Global reimbursement systems vary considerably in terms of pricing, co-payments, and settlements. The complexities arising out of these differences create complications for third-party payers, such as private insurance companies and social security systems. These companies play a key role between the patient and the healthcare organization/companies selling the braces and supports. Reimbursement in all countries, therefore, depends upon compliance with a complex set of rules and regulations.

Based on end users, the global orthopedic braces market has been segmented into orthopedic clinics, over the counter (OTC), hospitals, and other end users. In 2014, the orthopedic clinics segment accounted for the largest market share, followed by the OTC segment. The large share of the orthopedic clinics segment can be attributed to the fact that patients with painful conditions, such as osteoporosis, osteoarthritis, ankle arthritis, sprains, strains, cartilage tears, and fractures prefer consulting orthopedicians rather than directly visiting hospitals. There is a growing demand from clinicians for braces and supports that are injury- or surgery-specific, especially for knees, ankles, and shoulders. Patients with chronic pain conditions generally visit hospitals to undergo surgeries for osteoarthritis, ankle arthritis, and fractures. Orthopedic braces and supports are prescribed post-surgery as they help in keeping bones in position, allowing limited movement and faster healing. The other end users segment comprises gyms/health clubs, sports academies/outlets, pharmacy outlets, emergency centers, and trauma centers.

The global orthopedic braces and supports market is dominated by the orthopedic clinics segment; it is expected to grow at CAGR of 4.3% from 2015 to 2020. The OTC segment is projected to grow at the highest CAGR of 6.1% from 2015 to 2020.

The global orthopedic braces market has been categorized into major geographical regions, including Europe, North America, Asia, and Rest of the world. North America is the most dominant region in the global orthopedic braces market, and contributed a share of 47.4% in 2014; the market in this region was valued at USD 1.5 billion in the same year.

Some of the major players in the orthopedic braces market include Bauerfeind AG (Germany) Breg, Inc. (U.S.) DeRoyal Industries, Inc. (U.S.), DJO Global (U.S.), Ossur (Iceland), Ottobock (Germany), and BSN Medical (Germany).

These companies have adopted various strategies, such as merger & acquisition and partnership, among others, to achieve growth in the global orthopedic braces market.
Scope of the Report:

This report categorizes the global market for orthopedic braces & supports on the basis of type, end user, and region.

Market Segmentation, By Type:

Based on type, the global orthopedic support market has been segmented into knee braces & supports, foot and ankle braces & supports, spinal orthoses, and upper extremity braces & supports.

Market Segmentation, By End User:

Based on end-user, the market has been segmented into over the counter (OTC), orthopedic clinics, hospitals, and other end-users.

Market Segmentation, By Region:

The regional analysis covers North America, Europe, Asia-Pacific, and RoW.

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