Musculoskeletal System Disorders Market Research Report - Global Forecast till 2025

Market Forecast

The Global Musculoskeletal System Disorders Market is expected to cross USD 5.73 Billion by 2025 at a CAGR of 5.3%.

Market Synopsis

The number of musculoskeletal system disorder cases is increasing globally, fueling market growth. Musculoskeletal system disorders are the second-highest contributor to global disability and an estimated 20%–33% of people across the globe live with a painful musculoskeletal condition. Musculoskeletal disorders are most common in low- and middle-income countries and these disorders require lifelong care to manage.

Market Influencer

Rising prevalence of musculoskeletal disorders and increasing reimbursement offered to patients by health insurance providers.

Market Drivers

- Growing global geriatric population.
- Change in lifestyle habits leading to bad posture, which is increasing the prevalence of musculoskeletal system disorders.
- Increasing research and development of new drugs to treat musculoskeletal disorders. For instance, in 2017–2018, the National Institute of Health Research (NIHR) spent approximately USD 13.46 million (GBP 11.1 million) on research on musculoskeletal disorders.
- Rising prevalence of work-related musculoskeletal disorders. For example, the prevalence in the fiscal year 2017–2018 was about 469,000 in the UK.
- Rising awareness of advanced treatment for musculoskeletal disorders.
- Launch of new medication to manage the symptoms of chronic musculoskeletal system disorders.

Market Restraints

- High treatment costs.
- Availability of alternative therapies such as traditional medicine and physiotherapy
- Need for specialized equipment to diagnose and treat musculoskeletal system disorders.

Segmentation

By Type

- Rheumatoid Arthritis: The largest segment of the market, rheumatoid arthritis afflicts almost 1% of the entire global
population and is three times as likely to afflict women than men.

- **Osteoarthritis:** This disorder generally afflicts elderly people. As of 2018, about 9.6% of men and 18% of women over 60 had symptomatic osteoarthritis worldwide and over a quarter of those afflicted could not perform daily activities.

- **Osteoporosis:** The fastest-growing segment, over 75 million people suffer from osteoporosis in Europe, the US, and Japan. This number is growing in developing countries and the disorder is responsible for millions of fractures worldwide. By 2050, osteoporosis is expected to be responsible for a 310% increase in hip fractures for men and a 240% increase for women, as compared to rates in 1990.

- **Psoriatic Arthritis:** This autoimmune disorder afflicts roughly 3 out of every 10 individuals who have psoriasis. With over 100 million people afflicted globally with psoriasis, psoriatic arthritis afflicts almost 30 million individuals.

- **Ankylosing Spondylitis:** The tendency to develop this condition is genetic, with males twice to three times more likely to be afflicted than women.

- **Fibromyalgia:** A very common ailment, about 80%–90% of sufferers of fibromyalgia are women.

- **Others:** This segment covers musculoskeletal disorders such as tendinitis and carpal tunnel syndrome.

**By Treatment**

- **Biologics:** The fastest-growing segment, biologics find increasing application in the treatment of rheumatoid arthritis. A rise in the number of FDA approvals for biologics to treat musculoskeletal system disorders is a key factor for the growth of the segment.

- **Corticosteroids:** The largest segment, corticosteroids are the preferred treatment for many musculoskeletal system disorders as they reduce inflammation and suppress immune system activity.

- **Physical Therapy:** Used to manage almost all chronic musculoskeletal system disorders, physical therapy is prescribed in conjunction with medication.

- **Extracorporeal Shock Wave Therapy:** Used to manage pain, this therapy excels in providing fast-acting relief without the use of painkillers. Used extensively in managing musculoskeletal system disorders.

- **Protein Therapy:** A novel method used to combat several musculoskeletal system disorders; it involves the ingestion of protein via changes in diet and artificially produced proteins.

- **Synthetic Bone Graft:** An expensive and complex treatment option, synthetic bone grafts have been used to replace bones made too brittle by osteoporosis and other musculoskeletal system disorders.

- **Composite Grafts:** Used for several bone replacement and repair procedures.

- **Demineralized Bone Matrix:** The treatment method is used in bone transplants where the biological activity of the graft is more important than its mechanical properties.

- **Others:** This segment covers alternative treatment methods such as gene therapy and chiropractic care.

**By End User**

- **Hospitals and Clinics:** The largest segment, hospitals and clinics are usually the primary points for diagnosis, treatment, and rehabilitation of individuals afflicted with musculoskeletal system disorders. Growing awareness and increasing efficiency of musculoskeletal system disorder
treatment are projected to drive the growth of this segment during the forecast period.

- Ambulatory Surgical Centers: A small segment, these centers provide immediate pain relief and rudimentary surgical care.
- Others: This segment includes home care and senior citizen centers.

By Region

- Americas: The largest regional market, the prevalence of musculoskeletal system disorders is high in the Americas; the region also has a well-established healthcare industry.
- Europe: An increasing geriatric population is leading to a rise in the number of musculoskeletal system disorder cases.
- Asia-Pacific: The fastest-growing regional market, Asia-Pacific is seeing a surge in the number of people afflicted with musculoskeletal system disorders due to bad posture brought on by lifestyle changes, aging, and genetic predisposition.
- Middle East & Africa: The smallest market due to limited healthcare infrastructure and a very young population.

Key Players

- AB Science (France)
- AbGenomics International, Inc. (US)
- Alder BioPharmaceuticals, Inc. (US)
- Amgen Inc. (US)
- Lexicon Pharmaceuticals, Inc. (US)
- LG Chem (South Korea)
- OrthoTrophix, Inc. (US)
- Tarsa Therapeutics, Inc. (US)
- PhytoHealth Corporation (Taiwan)
- Eisai Co., Ltd (Japan)
- Astellas Pharma Inc. (Japan)
- AstraZeneca (UK)
- Baxter (US)
- GlaxoSmithKline PLC (UK)

Infographic Summary:

**GLOBAL MUSCULOSKELETAL SYSTEM DISORDERS MARKET**

**BY TYPE** (Rheumatoid Arthritis, Osteoarthritis, Osteoporosis, Psoriatic Arthritis, Ankylosing Spondylitis, Fibromyalgia and Others), **BY TREATMENT** (Corticosteroids, Biologics, Physical Therapy, Extracorporeal Shock Wave Therapy, Protein Therapy, Synthetic Bone Graft, Composite Grafts, Demineralized Bone Matrix, and Others), **BY END-USER** (Hospital & Clinics, Ambulatory Surgical Center, and Others), and **BY REGION** (Americas, Europe, Asia-Pacific, and Middle East & Africa)

**FORECAST TILL 2025**

**MARKET SIZE** 3837.7 MILLION USD

**CAGR (2019-2025)** ~5.30%

**MARKET SEGMENTATION**

- Rheumatoid arthritis holds the largest share in market due to rising aging population
- Corticosteroids hold the largest share in market as it helps increase muscle strength and slow
- Hospital & Clinics is the largest segment owing to the increasing visits of musculoskeletal system
- Americas holds the largest market share owing to the increasing prevalence of muscle disorders and increasing per capita healthcare expenditure.
progression. As there is increasing prevalence of musculoskeletal system disorders the demand for its treatment is also increasing.

STAKEHOLDERS CONSIDERED
Market Research and Consulting Firm
Association and Government Organizations
End-Users
Product Manufacturers

KEY COMPANIES PROFILED
- AB SCIENCES (Japan)
- ABERGENOMICS INTERNATIONAL (India)
- ALDER BIOPHARMACEUTICALS (US)
- AMGEN (US)
- ANTARES MEDICAL SERVICES (India)
- LEXICON PHARMACEUTICALS (US)
- LS LIFE SCIENCES (South Korea)
- ORTHOTOPHIX (California)
- TARSA THERAPEUTICS (US)
- PORTHEALTH CORPORATION (Taiwan)
- EISAI (Japan)
- ASTELLAS (Japan)
- ASTRAZENECA (UK)
- BAXTER (US)
- GLAXOSMITHKLINE (UK)

FACTORS STUDIED FOR MARKET FORECAST
DRIVERS
- Rising Geriatric Population
- Rising Prevalence of Musculoskeletal System Disorders

RESTRAINT
- Rising cost of the ultrasound used for the musculoskeletal disease’s treatment

REPORT COVERAGE
- Number of Pages: 110
- Number of Chapters: 12
- Number of Tables: 80
- Number of Figures: 40
- Major Countries: 12
- Expert Interviews: 43
- Major Companies Profiled: 10

KEY QUESTIONS ANSWERED
- Market size (2016-2017 [Historical Years], 2018 [Base year], 2019-2025 [Forecast Years]) of various segments?
- What are the current trends in the market? What would be the market scenario in the coming years?
- Market Share Analysis (Major Competitors 2018)
- What would be the market scenario in the coming years?
- Who are the key market players and what are their strategies to gauge strong foothold in the market?
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