

# Orthopedic Industry Executives Examine Top Growth Opportunities

Mike Evers, ORTHOWORLD

Rob Ball, Shoulder Innovations

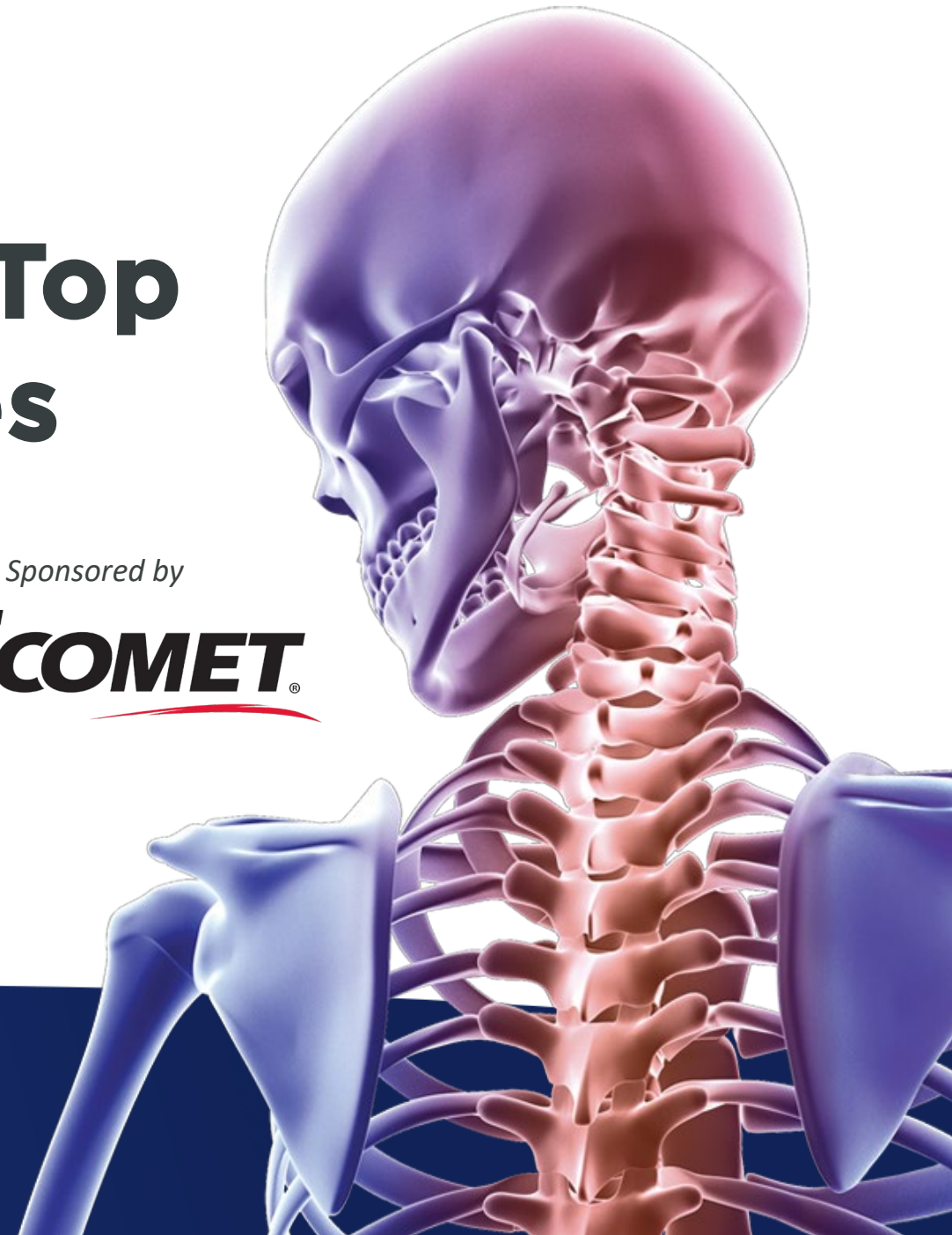
Dr. Wael Barsoum, HOPCo

Dr. Nitin Goyal, Zimmer Biomet

Kevin McGann, Accelus

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# Market Update

Mike Evers

Senior Market Analyst

ORTHOWORLD

# Orthopedic Markets Improved



# A Dynamic Environment

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Supply Chain and Staffing



Improving Volumes



VBP in China

**+3.5%**  
\$55.5 billion

# Expectations for 2023

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Elevated Recon Market



Lingering Uncertainty



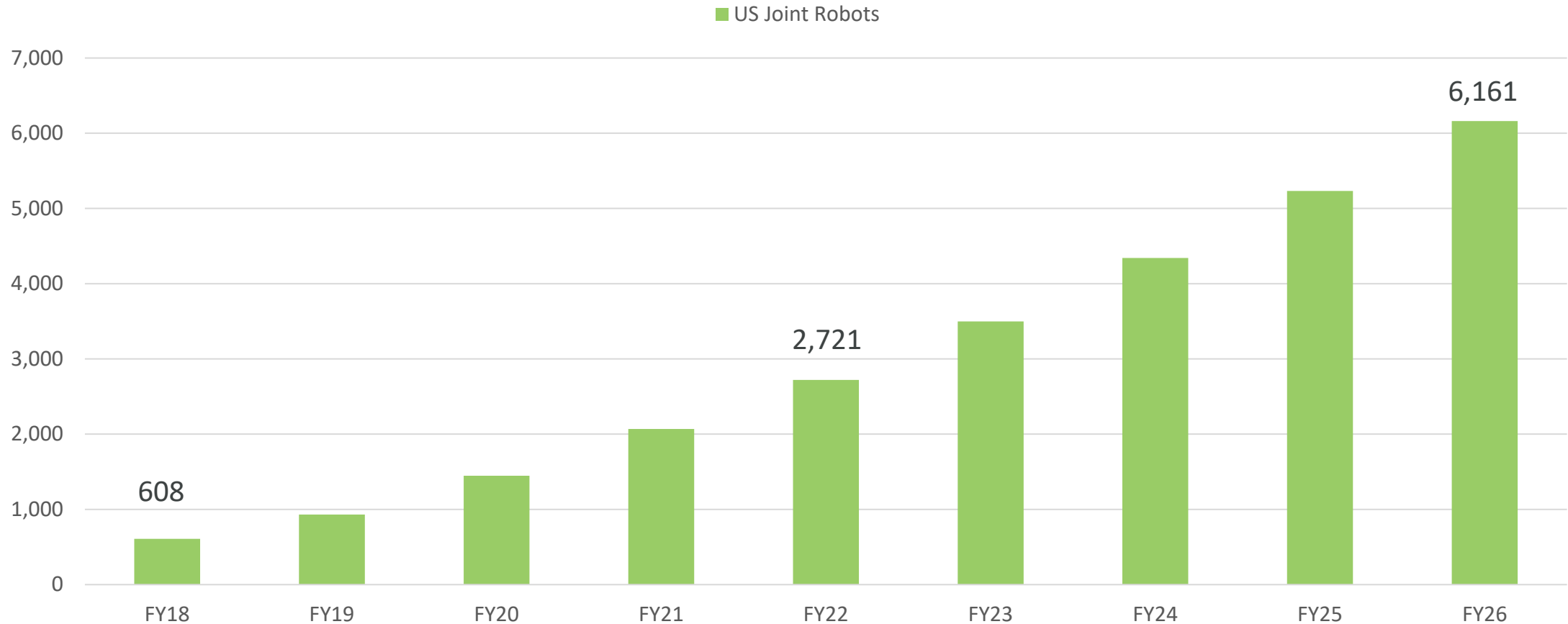
VBP in China

**+3.4%**  
\$57.3 billion

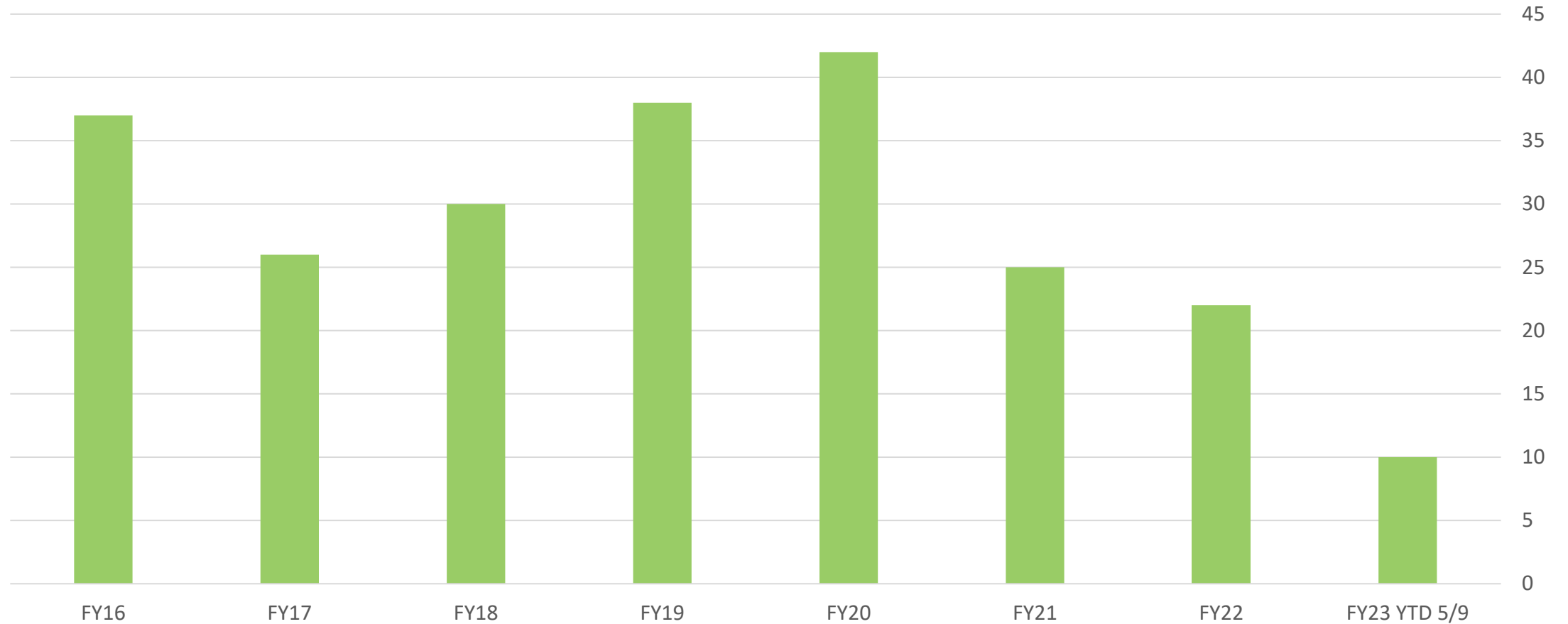


# Market Drivers

# Orthopedics' Pivot to Digital

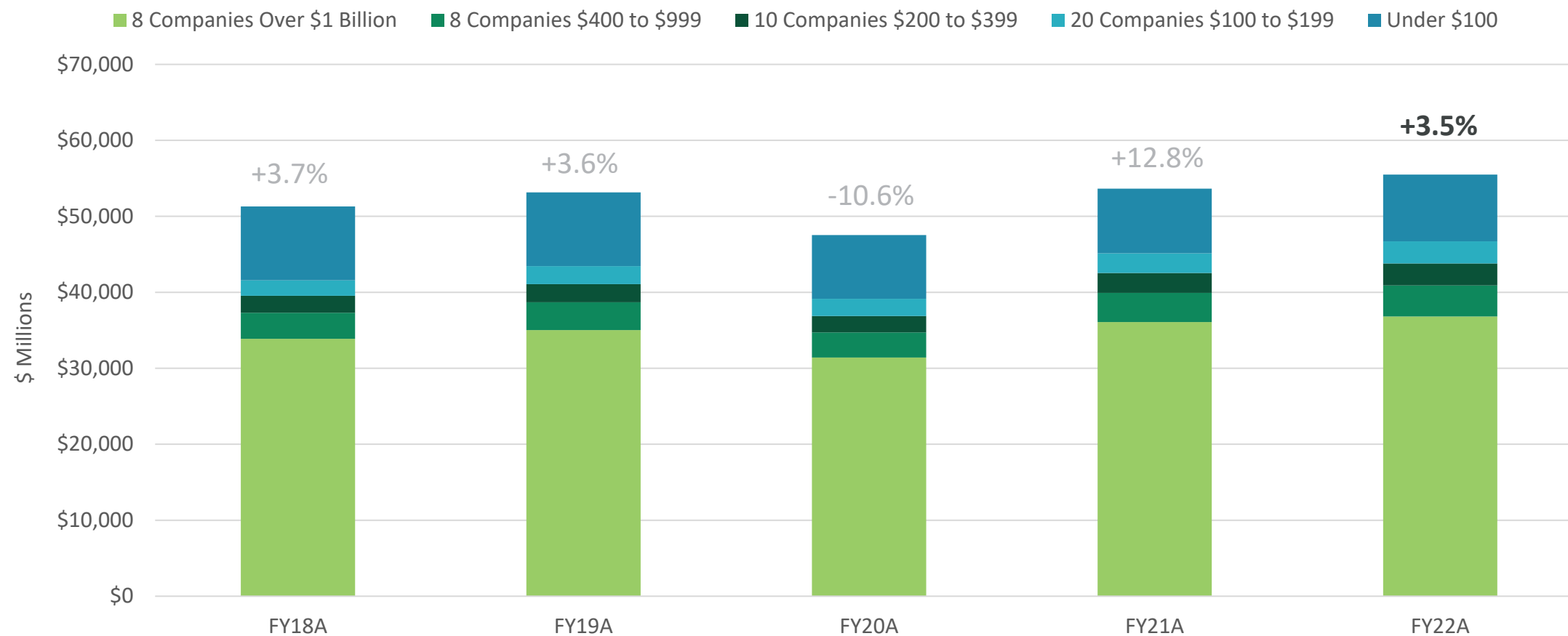


# Orthopedic M&A Transactions





# Company Revenue by Tier



# Acceleration of Outpatient Orthopedics

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Constrained Capacity and Reimbursement



Driving Design Considerations



Focus From Strategics



**On to the Keynote Panel!**