

# ORDER FORM

**EUROPEAN ORTHOPAEDIC MARKET 2008-2012**  
**HIP, KNEE & SHOULDER**  
 NOVEMBER 2009 - 11<sup>th</sup> Edition



## PRODUCT OPTIONS

	Number of pages	Single license user	Corporate license user
<b>Main report</b> 5 countries + Rest of Europe and 3 products (Hip & Knee & Shoulder)	> 500	5.900 €	7.900 €
<b>All Europe for 1 product</b> (Hip or knee or shoulder) Please specify	> 200	4.700 €	6.300 €
<b>1 Country</b> (Fr, Ger, UK, It, Sp, RoE) with all products Please specify	> 150	3.900 €	5.200 €

A Corporate (or multi-user) license is needed for any organization requiring more than one user in at least two different geographic sites.  
 Please add 19.6% VAT for the the french companies Payment dues at the reception of the report

## 3 DELIVERY OPTIONS

Please select

- PDF via E-mail
- CD-Rom
- Hard copy (+300 € additional charges)

## 4 WAYS TO ORDER

- 1- E-mail the order form to  
a.madani@avicenne.com
- 2- Fax the order form to  
+33-1-47 78 46 01
- 3- Mail the order form to AVICENNE,  
Litwin Bldg, 10 rue Jean Jaurès, 92807  
Puteaux Cedex, FRANCE
- 4- By Credit Card: Mastercard, Visa,  
Please contact us

Date, Signature & Stamp

## CUSTOMER INFORMATIONS

Name: .....

Title: .....

Company: .....

Email: .....

Address: .....

City/Country: .....

Tel.: .....

Fax: .....

## PAYMENT

Total € (from above) .....

Purchase order number (if available): .....

Accounting dept. address  
(if different than company address): .....

## REFERENCES

AESCLAP- B BRAUN, ATS STELLITE, B&G, BIOLAND,  
 BIOMET, BIOMICRON, CERAMTEC, CERAVAR OSTEAL,  
 COUSIN BIOTECH, DEPUY - J&J, DESMARQUEST,  
 EVOLUTIS, FH, FINCERAMICA, FINETUBES, FIXANO,  
 GEISTLICH, GEOFFROY MEDICAL, GOLDMAN SACHS,  
 HELP ORTHO, HEPTAL, IMPLANTS INDUSTRIE, KOMET,  
 LEPINE, LISI, MANOIR INDUSTRIES, MATHYS, MBA,  
 MEDACTA, MEDTRONIC SNT, MEDTRONIC SOFAMOR  
 DANEK, OC&C STRATEGY, ORTHOSOFT, OST  
 DEVELOPPEMENT,OSTEOTECH, PLUS ORTHOPEDICS,  
 PRAGMA CAPITAL, PROGENOR, PROJECTION  
 PLASMA SYSTEM, SCIENT'X, SEM, SECTRA, SEREMM,  
 SGM-CODIM, SME, SMI, SMITH & NEPHEW, SOMEPIC,  
 SPINEWAY, STANMORE IMPLANTS, STRYKER,  
 SYMBIOS, TEROLAB, TORNIER, TRANSTRUCTURE,  
 TRANSYSTEME, WICHARD, WILLEMIN MACODEL,  
 WRIGHT, ZIMMER



AVICENNE  
 Litwin Building  
 10, Rue Jean Jaurès  
 92807 Puteaux Cedex  
 FRANCE  
 Tel: +33 (0) 1 47 78 46 00  
 Fax: +33 (0) 1 47 78 46 01  
 CONTACT: ALI MADANI  
 a.madani@avicenne.com

www.zirakdesign.com

## STRATEGIC REPORT EUROPEAN ORTHOPAEDIC MARKET 2008-2012 HIP, KNEE & SHOULDER



### YOU WILL FIND IN THE REPORT:

- **Hip, Knee & Shoulder detailed segmentations:**
  - > **Type:** Total, Partial, Revision, Modular/monobloc,
  - > **Fixation:** Cemented, Cementless, Hybrid,
  - > **Bearing:** Metal/polyethylene (PE), Ceramic/PE, Ceramic/Ceramic, Metal/Metal
- **5 countries analyzed: Germany- Italy- France- Spain- UK & Rest of Europe**
- **Volume, Value & average prices by product by country and competitor**
- **5 years forecasts**
- **Competitor's Market shares**
- **Main trends**
- **New developments**

**NOVEMBER 2009 - 11<sup>th</sup> Edition**

[www.avicenne.com](http://www.avicenne.com)



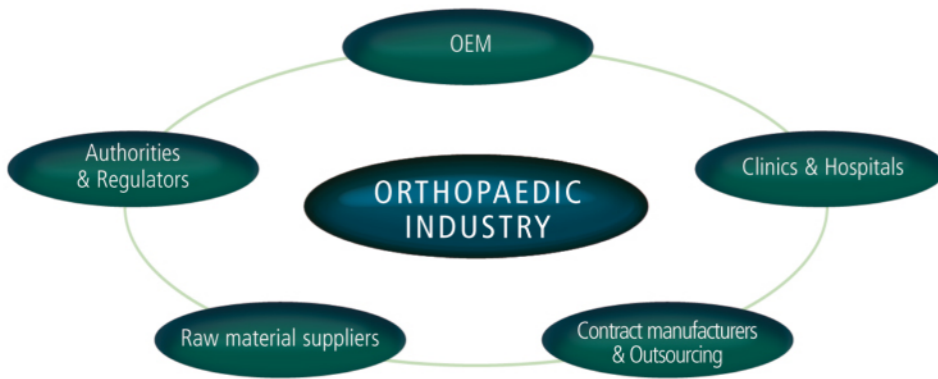
## AVICENNE & METHODOLOGY

AVICENNE is a unique Orthopaedic market research company, providing for over 15 years unrivalled advantages to our clients in the Orthopaedic Industry.

With our presence in Europe, we are able to identify early trends and new technologies affecting the Orthopaedic market. Over the years we have been in close relationship with the main actors in the European and US markets. Capitalizing on our expertise, we organize and chair since 2005 the main Orthopaedic Contract Manufacturers Conference & Exhibition in Europe.



### AVICENNE HAS ACCESS TO ALL INDUSTRY LEVEL INFORMATION



## OUR STORY

Founded in 1992, AVICENNE is a small but internationally renowned company with an extensive business Network. This Network, crucial to our company's success, was build thanks to our team former involvement in these industries and with these actors, but foremost due to our close and continual cooperation with top management.

## OUR MISSION

AVICENNE provides sustainable and in-depth information for decision-makers in highly innovative and fluctuant industries. This valuable information permits our clients to take the best financial, operational and strategic decisions.

## OUR EXPERTISE

Our team is always up-to-date with the latest market evolutions. We consistently monitor the main actors of the value chain and reevaluate customers' needs in light of market changes. The Company Size enables a close contact to customers, fosters a familiar working atmosphere, ensures flexibility, and assures full confidentiality. The Worldwide Business Network provides accurate data and privileges special insights. The Working Method develops a critical mind focusing on the clients' understanding.

## OUR VALUES

**Integrity:** AVICENNE is an independent consulting company. Our ethical principles are inherent to the honesty and integrity of the people working within our structural framework.  
**Clients come first:** We work with the client not for the client. Our main and principal target is to serve client's best interests. We take pride to favour our clients' interests rather than our profitability. This is the key of our credibility.  
**Respect for the Individual:** We support and respect personal growth; We believe that a collegial environment fosters continuous learning; Teamwork and cooperation are essential to our success; We therefore encourage constructive criticism.

## OUR TEAM

AVICENNE most significant asset is its team of consultants with both scientific & marketing skills. Always curious, we constantly evaluate new ideas and new opportunities in order to provide best service.

## MUCH MORE DETAILS THAN OTHER MARKET RESEARCH COMPANIES

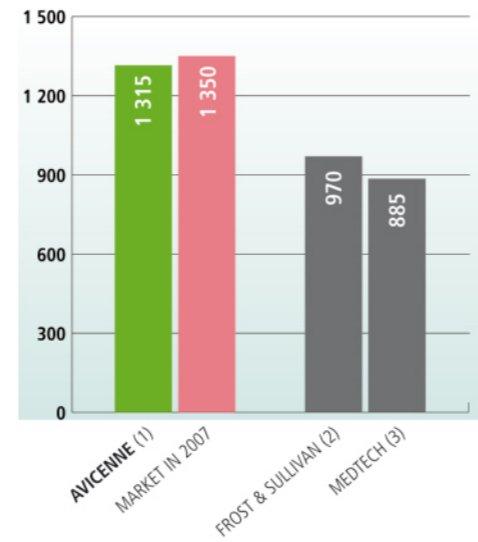
	AVICENNE	MEDTECH	MILLENIUM	FROST & SULLIVAN
Market in value	✓	✓	✓	✓
Average Sales Price	✓	✓	✓	NO
Market in volume	✓	✓	✓	NO
Data by type (Total/Partial/Revision)	✓	✓	✓	NO
Data based on...	2007	2007	2006	2005
Data by fixation	✓	✓	NO	NO
Market shares by segment	✓	NO	NO	NO
Data by bearings	✓	NO	NO	NO

■ SATISFACTORY ■ UNSATISFACTORY

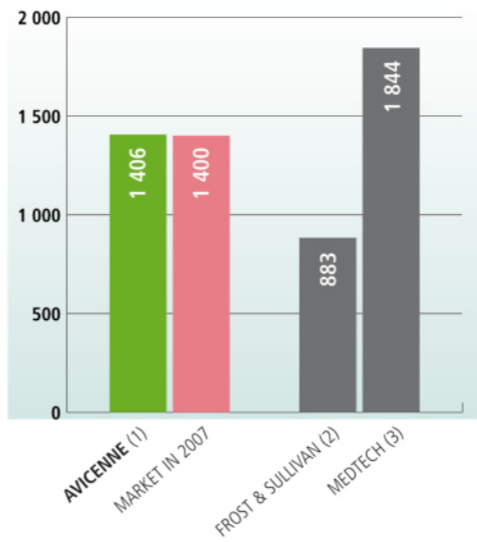
## MUCH MORE ACCURATE THAN COMPETITORS

Compare to US competitors; AVICENNE got much more accurate data in EUROPE. Competitors made a 35% to 50% error for the HIP market in Europe & 25 to 60% error for the KNEE IMPLANTS market in 2007.

EUROPEAN HIP MARKET IN 2007 IN MUS\$

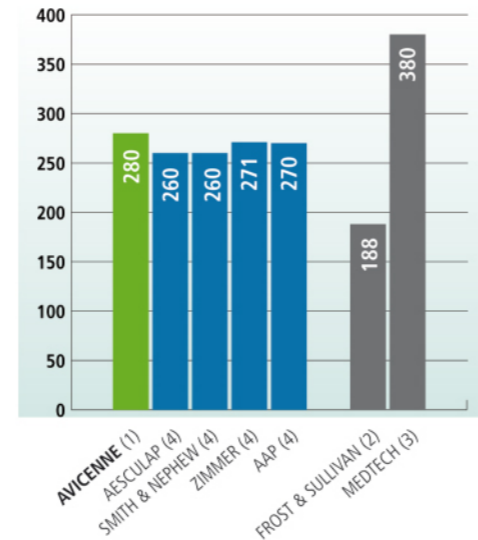


EUROPEAN KNEE MARKET IN 2007 IN MUS\$

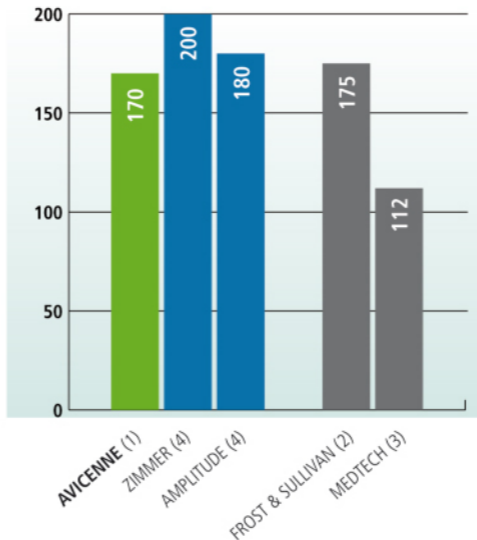


(1) Source AVICENNE: The European orthopaedic market, 10th Edition, June 2008 – (1 € = 1.37 US \$)  
 (2) Source FROST & SULLIVAN: Orthopaedic Implants Markets in Europe - H018-54 – September 2006  
 (3) Source MEDTECH: European markets for total joint replacement products – A312 – April 2008  
 (4) Source MARKET IN 2007: average data based on 44 interviews

GERMAN KNEE MARKET IN 2007 IN M€



FRENCH HIP MARKET IN 2007 IN M€



(1) Source AVICENNE: The European orthopaedic market, 10th Edition, June 2008 – (1 € = 1.37 US \$)  
 (2) Source FROST & SULLIVAN: Orthopaedic Implants Markets in Europe - H018-54 – September 2006 (1 € = 1.22 US\$)  
 (3) Source MEDTECH: European markets for total joint replacement products – A312 – April 2008 (1€ = 1.42 US \$)  
 (4) Confidential Interviews with high level management contacts in each company

## VERY LARGE COMPETITOR COVERAGE

### EUROPE: HIP, KNEE & SHOULDER IMPLANTS COMPETITORS

GERMANY	ITALY	FRANCE	SPAIN	UK
AAP	Aesculap	3Sortho	Aesculap	Aesculap
Aesculap	Amplitude	AAP	Amplitude	Biomet
Amplitude	Aston Medical	Aesculap	Biomet	Corin
Argomedical	ATF	Amplitude	C2F Implants	Depuy
Biomet	Biomet	Aston Medical	Corin	Finsbury
Depuy	Ceraver	Biomet	Depuy	JRI
Eska	Citieffe	Biotechni	Groupe Lépine	Link
Implantcast	Corin	Ceraver	Lafitt	Mathys
Link	Depuy	Depuy	Lima	S&N
Mathys	Eska	FH	Link	Stryker
Peter Brehm	Groupe Lépine	Groupe Lepine	Mathys	Tornier
S&N	Lima	Lima	MBA	Wright
Stryker	Link	Link	SME Dedienne	Zimmer
Tornier	Mathys	Mathys	S&N	...
Wright	Medacta	Medacta	Stryker	
Zimmer	Prothèos	Prothèos	Surgival	
...	SEM	SEM	Symbios	
	SME Dedienne	Serf	Tornier	
	S&N	SME Dedienne	Wright	
	Stryker	S&N	Zimmer	
	Symbios	Stryker	...	
	Tornier	Symbios		
	Wright	Tornier		
	Zimmer	Wright		
	...	Zimmer		
		...		

## THIS REPORT WILL HELP YOU TO

- Comprehend today's market environment
- Outline future applications
- Determine market in volume and value
- Make thorough business decisions
- Assess new products & technologies
- Gather accurate data for presentations
- Identify current and new competitors
- Support your research and development
- Understand future trends and perspectives

## TESTIMONIALS

*The work was completed thoroughly...You brought our company useful information*

Lynda Goodrich, Marketing communication Medtronic SNT, USA

*"We are globally satisfied with content of the data you provided. It is extensive and reaches a precious level of granularity."*

OC&C - UK

*"My team and I were really impressed with the level of detail & thoroughness of the report. They have always been very valuable to us."*

Kristhen Wermuth, Associate Consultant, Bain & Cie Inc, USA