

Lighthouse Orthopaedic Marketing & Strategic Planning Database

Lighthouse Orthopaedics



Market Research Product Development Business Development Market Access & Sales

www.lighthouseorthopaedics.com

Lighthouse Orthopaedics has developed an accurate and reliable business planning and marketing database that gives you the data you need. From a database of over 30,000 pieces of data we can give you the data so you can build sales forecasts and identify growth opportunities, while maximising profit margins.



Today's orthopaedic market is changing and evolving; with mergers and acquisitions, more regulated product development, increased competition and new fast growing segments appearing a need to understand and quantify the impact of these changes is becoming more important.

Using existing global data to make your strategic decisions can be costly and doesn't show the variances between markets and segments. At Lighthouse we believe the more detailed and specific your market research, the more confident you will be. Our database looks at products and markets totalling a global sales value of \$40 billion, and allows you to understand the opportunities at a local and product level.



based on experience

Lighthouse has worked with experienced orthopaedic sales, marketing and development professionals to determine what information they need to make the right business decisions.

The first stage of any business decision is reliable and accurate data that will form the basis of successful, long term growth.

Finding accurate and detailed research has been a problem, but strategy and sales planning has been built on the back of this.

At Lighthouse we recognise your need to use data at a country and product level to make better decisions.

detailed and integrated data

The new **Lighthouse** database and planning tool covers the 4 key areas of business and portfolio planning.

 **Age/Gender Demographic Trend**

 **Current Incidence Rates**

 **Implant Price Benchmarking**

 **Sales Growth and Market Shares**

By combining these 4 databases you can make realistic and profitable decisions.

allows personalised reports

Our database will allow you to make more informed decisions, by producing personalised, accurate and reliable reports.

 **Company Sales Reports**

 **Country Reports**

 **Product Reports**

 **Market Analysis Reports**

Tailor made reports are produced on request so you get just the data you need.



 **For further information and sales prices please contact tim@lighthouseorthopaedics.com and let us help you with your market research and strategic planning.**



European Orthopaedic Analysis 2005-2030



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Demographics

- ✎ With demographic profiles of **28 European countries** you can fully understand the impact, negative or positive, that will be seen in the European orthopaedic market up to 2030.
- ✎ Identifying the **large variances** of demographic trends within each European country you can see exactly where the largest changes will take place.
- ✎ Showing the specific demographic profile of **females over 65** and **children under 15**, we are able to help identify **fragility** and **paediatric** fracture trends over the next 15 years.

Implant Pricing

- ✎ With published price lists in all major non US markets we are able to build **pricing profiles** by country or by specific products across all markets.
- ✎ With the increase of new companies this section allows you to benchmark your products against market leaders and decide which country allows you the greatest margins.
- ✎ With commonly used implants varying in price across Europe by up to 70%, this tool helps maximise your sales efforts and save time and money by illuminating markets that don't fit your goals.

Incidence Rates

- ✎ In addition to the demographic make up of Europe you can see the number of reported incidences of orthopaedic procedures using **ICD 9** or **ICD 10 codings**.
- ✎ With large variances within Europe this helps to profile which countries will be the **largest users** of specific products.
- ✎ By linking the incidence rates today with the future demographics of each European Country we can identify the **largest growth areas** of orthopaedics.

Market Value & Growth by Company

- ✎ Published sales data for over **25 market and segment leading orthopaedic companies** is analysed to calculate market sizes and shares for the global orthopaedic market.
- ✎ They are also broken down to product type to help understand the size and growth of **hip/knee, trauma, extremities, biomaterials and spine** in the key regions.
- ✎ These numbers are updated every 3 months to show quickly any **future trends** or **strategies** that are working.



10 Lighthouse facts that could double your profits...

Europe's ageing but static population

- ① Europe's population will grow **less than 1%** over the next 5 years.
- ② Since 2010 in Europe the number of women **over 65** years grew by **11%** and will continue to grow by **8%** up to 2020.
- ③ In France it will grow at **twice the rate** of Germany and Italy.

Europe has 28 price lists for the same product

- ④ UK prices for **Proximal femoral nails** and **locking plates** can be **70% +** than Germany and **50% +** France and Italy.
- ⑤ Australian reimbursement rates allow **premium pricing**.

Europe's changing fracture patterns

- ⑥ Reported numbers of **forearm** fractures in Europe are down **10%** since 2010.
- ⑦ Germany has an incidence rate for forearm fractures **3 times greater** than Italy.
- ⑧ Germany saw a **4 times greater increase** in its incidence rates for femoral fractures compared to France and the UK since 2010.

Orthopaedics winners and losers

- ⑨ **25** leading orthopaedic companies have a combined annual sales of nearly **\$40 billion** a year growing at **1.3%**.
- ⑩ Companies specialising in either Spine or Trauma have seen the **highest growth** in market share.