

CIC 灼识



China's Sports Medicine Device Industry Report

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Executive Summary

China's sports medicine device market remains in its early stages of development and has long been dominated by global industry giants. Driven by the country's aging population, rising prevalence of chronic diseases, growing public health awareness and purchasing power, alongside supportive policy frameworks and regulatory guidance, the domestic market for sports medicine implants and surgical devices is projected to sustain robust long-term growth.

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1. Market Overview

1.1 Market Definition

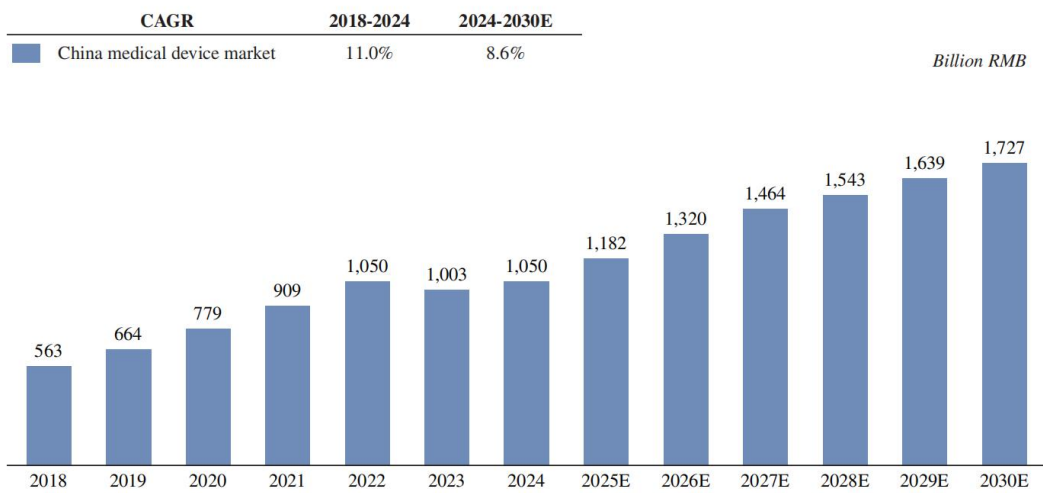
Sports medicine is a specialized branch of medicine focused on the prevention, diagnosis, treatment and rehabilitation of sports-related injuries. It integrates medical knowledge with exercise science to minimize the injury risks, and manage medical issues related to exercise, including soft tissue injuries. Sports medicine addresses the medical needs arising from daily physical activities, emphasizing injury prevention, physical function enhancement, injury treatment, impairment management and injury rehabilitation.

Penetration rates for sports medical devices in China remain subdued. Driven by deepening population aging, rising consumer purchasing power and health awareness, alongside continuous technological advancement, the domestic sports medicine industry boasts substantial long-term growth headroom.

1.2 Market Size and Growth of the Sports Medicine Device

China's medical device market has experienced a steady growth. The market size increased from RMB562.9 billion in 2018 to RMB1,050.2 billion in 2024, representing a CAGR of 11.0%, and is expected to further reach RMB1,726.7 billion in 2030, representing a CAGR of 8.6%.

China's Medical Device Market Size, 2018-2024, 2025E-2030E



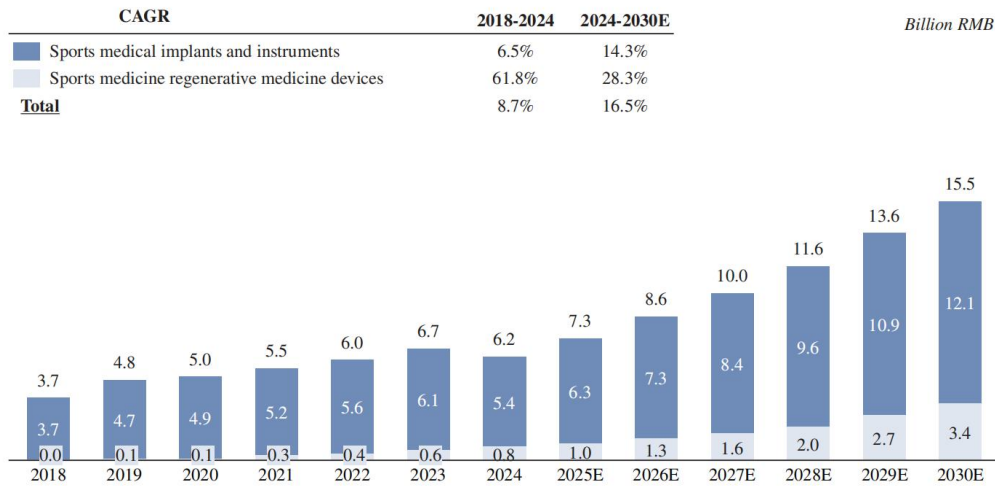
Note: By sales revenue, in terms of ex-factory prices.

Source: annual reports published by market players, NMPA, National Bureau of Statistics of China, CIC Reports

Sports medicine is a specialized branch of medicine focused on the prevention, diagnosis, treatment and rehabilitation of sports-related injuries.

China's sports medicine device market accounted for less than 1% of China's medical device market in 2024, while the remainder of the market primarily consisted of other medical device segments, including medical imaging equipment and in vitro diagnostics.

Market size of China's sports medicine device market, 2018-2024, 2025E-2030E



Note: Note: By sales revenue, in terms of ex-factory prices.

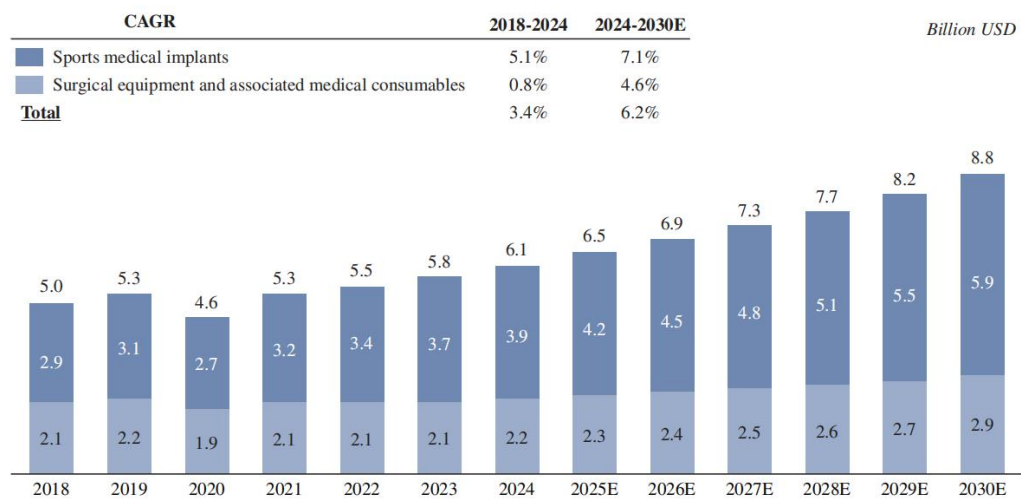
Source: annual reports, CIC Reports

The sports medicine device market can be divided into two major parts, sports medicine implants and instruments, and sports medicine regenerative devices. Sports medicine implants and instruments are implants, equipment as well as associated consumables that are used in sports medicine surgeries, to provide support and help stabilize the joints, ligaments, tendons, and muscles that have been injured or damaged.

The global sports medicine implants and instruments market has reached the maturity stage. The global sports medicine implants and instruments market size increased from US\$5.0 billion in 2018 to

US\$6.1 billion in 2024, representing a CAGR of 3.4%, and is expected to further reach US\$8.8 billion in 2030, representing a CAGR of 6.2%.

Global Sports Medicine Implants and Instruments Market Size, 2018-2024, 2025E-2030E

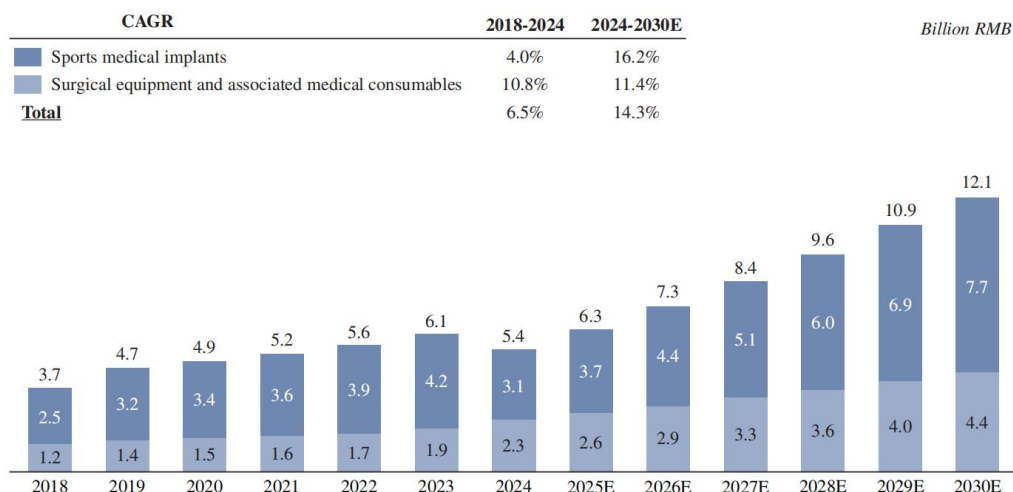


Note: By sales revenue, in terms of ex-factory prices.

Source: annual reports published by market players, interviews with industry experts, CIC Reports

The market size of China’s sports medicine implants and instruments market increased from RMB3.7 billion in 2018 to RMB5.4 billion in 2024, representing a CAGR of 6.5%, and is expected to further reach RMB12.1 billion in 2030, representing a CAGR of 14.3%.

China's Sports Medicine Implants and Instruments Market Size, 2018-2024, 2025E-2030E



Note: By sales revenue, in terms of ex-factory prices.

Source: NMPA, interviews with industry experts, CIC Reports

Sports medical implants are medical devices inserted into the human body to repair the damages and restore the functions of soft tissues such as ligaments, joints, and tendons, or to replace these damaged soft tissues entirely. These medical implants are typically used under the arthroscope, and are applicable in most sports-related injury cases. Key product categories include suture anchors, interference screws and sheath fixation systems, suture buttons, high-strength sutures and meniscus repair systems.

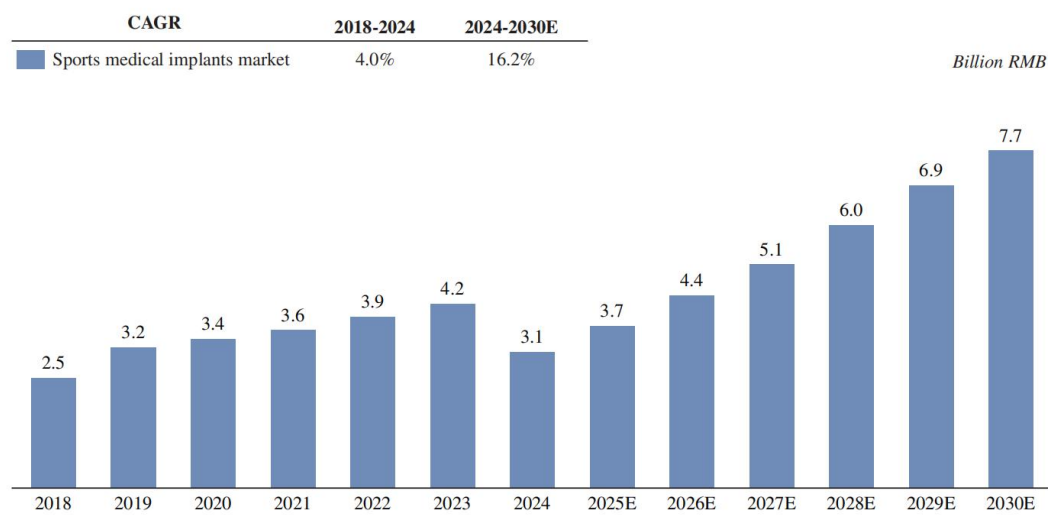
Major types of products in sports medical implants market

Category	Material composition	Indications	Key product attributes
Suture Anchors	Metal materials, (e.g., titanium alloy), bioabsorbable materials, PEEK, all-suture (Ultra-High Molecular Weight Polyethylene, UHMWPE)	Fixation of soft tissues to bone in shoulder, ankle, knee, hip, wrist and other joints	Material/ Pull-out strength/ Torsion resistance
Interference Screws and Sheath Fixation System	PEEK, bioabsorbable high molecular polymers	Fixation between soft tissue (muscle/tendon) and bone, especially in knee joint	Material/ Nominal diameter/ Axial pull-out force
Suture Buttons	Titanium alloy plate and UHMWPE	Reconstruction of anterior cruciate ligament (ACL), used for femur side fixation	Loop specifications/ Cyclic loading
Ultra High-Strength Sutures	UHMWPE	Used for repair and fixation of muscles, tendons, and soft tissues: in foot, ankle, knee, elbow, wrist, shoulder joints	Suture length/ Roughness/ Tensile strength
Meniscus Repair System	Fixation components: PEEK, bioabsorbable material Suture materials: UHMWPE	Used for meniscus tear repair	Material/ Load limit/ Repair site displacement/ Sharpness
Artificial ligament	PET UHMWPE	Replacing or reinforcing damaged ligaments	Material/size/ mechanical strength/ appearance/color

Source: NMPA, Journal of Tissue Engineering and Regenerative Medicine, CIC Reports

The market size of China’s sports medical implants increased from RMB2.5 billion in 2018 to RMB3.1 billion in 2024, representing a CAGR of 4.0%, and this market is expected to further reach RMB7.7 billion in 2030, representing a CAGR of 16.2%.

China's sports medical implants market size,
2018-2024, 2025E-2030E



Note: By sales revenue, in terms of ex-factory prices.

Source: NMPA, interviews with industry experts, CIC Reports

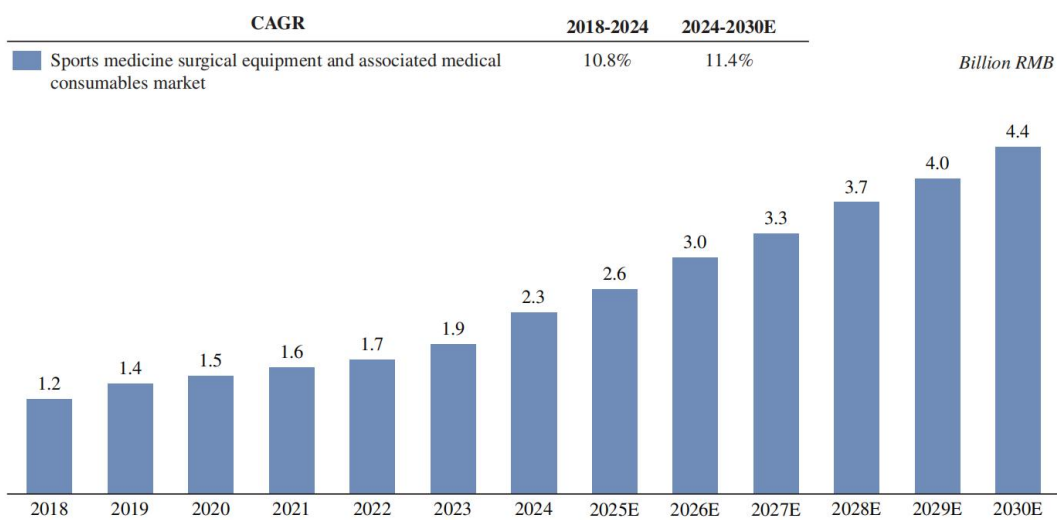
Sports medicine devices include medical devices and equipment used for surgical repair, reconstruction, or replacement.

Surgical equipment for sports medicine mainly includes active equipment and surgical instruments. Active equipment refers to any device that relies on an external energy source and functions by converting or altering the density of that energy, according to the EU Medical Device Regulation (MDR). In China, under the Medical Device Classification Catalogue (2017 edition), active equipment includes high/radio frequency equipment and surgical equipment used in

arthroscopic surgeries, including surgical shaver systems, plasma ablation equipment, and arthroscopic camera systems.

The market size of sports medicine surgical equipment and associated medical consumables in China increased from RMB1.2 billion in 2018 to RMB2.3 billion in 2024, with a CAGR of 10.8%. This market is expected to further reach RMB4.4 billion in 2030, representing a CAGR of 11.4%.

China's sports medicine surgical equipment and associated medical consumables market size, 2018-2024, 2025E-2030E



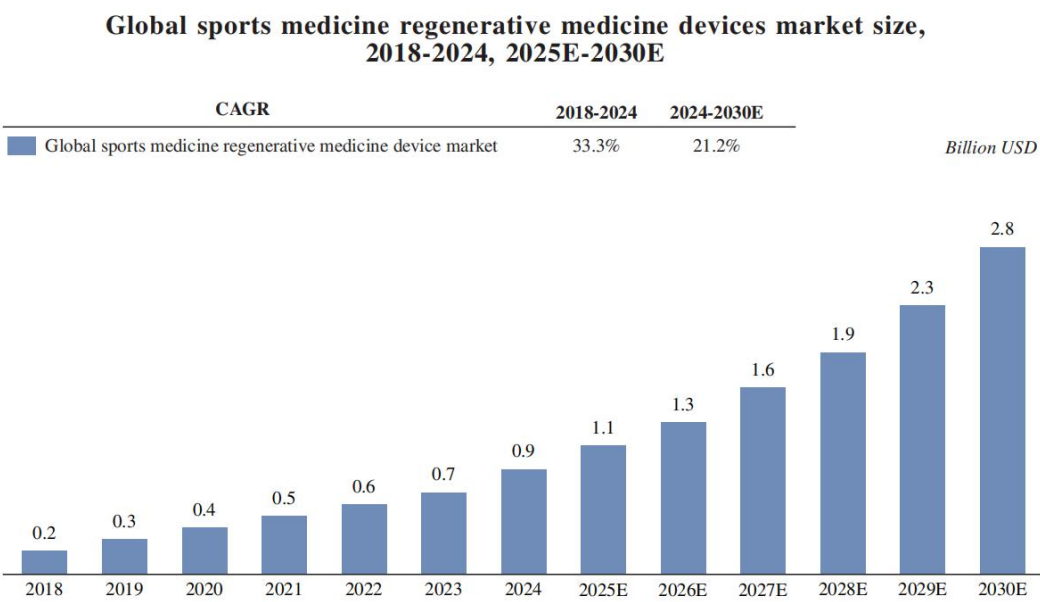
Note: By sales revenue, in terms of ex-factory prices.

Source: NMPA, interviews with industry experts, CIC Reports

The sports medicine regenerative devices, which distinguish themselves from traditional implants and instruments, contain bioactive materials to regenerate or restore soft tissues. Sports

medicine regenerative medicine devices are therapies and biomaterials designed to regenerate or restore soft tissues in joints such as ligaments, tendons, and cartilage. These devices distinguish themselves from traditional medical devices using mechanical fixation by leveraging biology and tissue engineering technologies, aiming to achieve the transition from repair to regeneration.

The market size of global sports medicine regenerative medicine devices increased from US\$0.2 billion in 2018 to US\$0.9 billion in 2024, representing a CAGR of 33.3%, and this market is expected to further reach US\$2.8 billion in 2030, representing a CAGR of 21.2%.



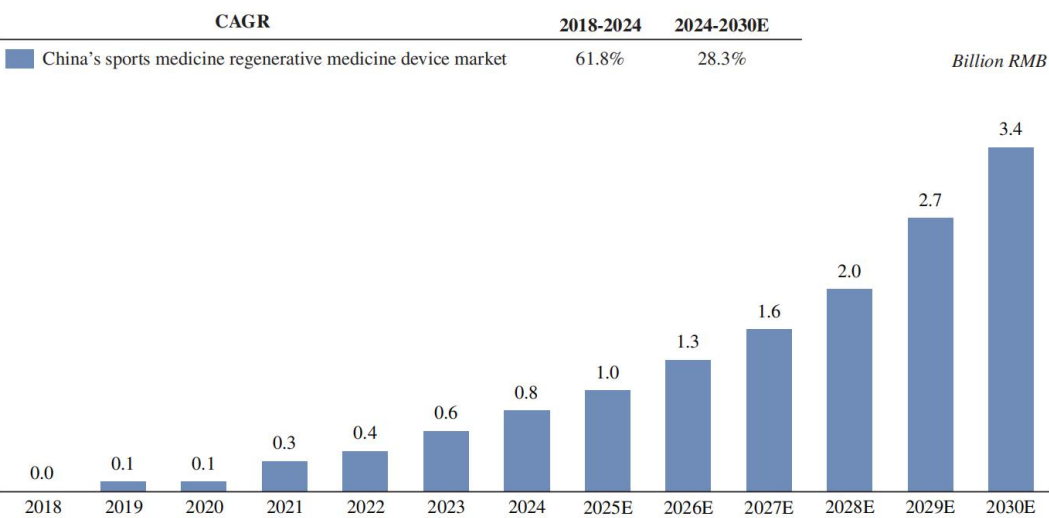
Note: By sales revenue, in terms of ex-factory prices.

Source: Hand Clinics, PNAS, annual reports published by market players,

interviews with industry experts, CIC Reports

China's sports medicine regenerative medicine devices market grew from RMB42.3 million in 2018 to RMB758.5 million in 2024, at a CAGR of 61.8%. Driven by accelerated R&D progress and regulatory approvals for innovative products, the China's sports medicine regenerative medicine devices market is projected to expand to RMB3,380.0 million in 2030, with a CAGR of 28.3%.

China's sports medicine regenerative medicine devices market size, 2018-2024, 2025E-2030E



Note: By sales revenue (in terms of ex-factory prices)

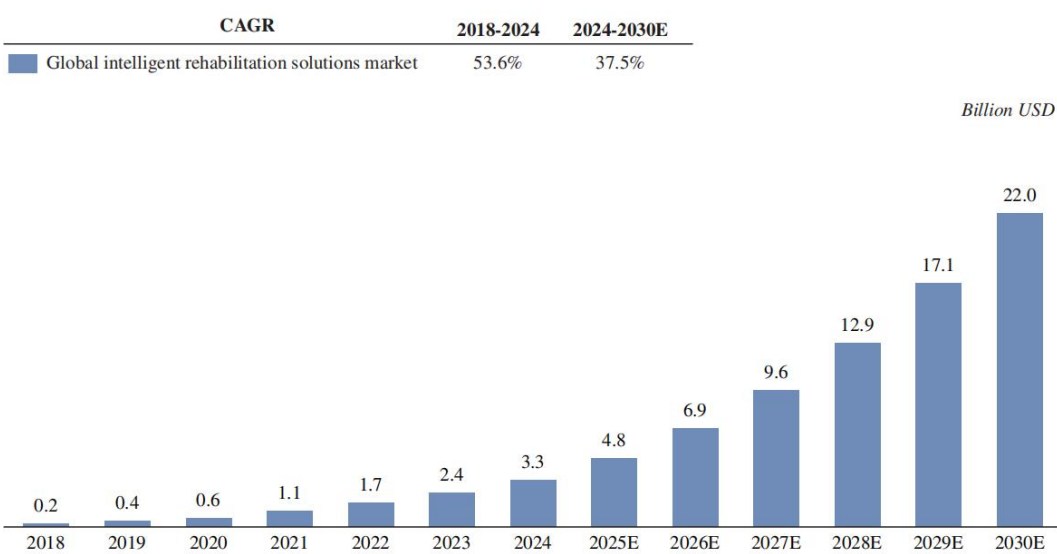
Source: Hand Clinics, PNAS, annual reports published by market players, interviews with industry experts, CIC Reports

1.3 Market Size and Growth of the Intelligent Rehabilitation

Intelligent healthcare leverages AI and big data analytics to interconnect medical resources and patient-oriented services across prevention, diagnosis, treatment and rehabilitation.

The global market for intelligent rehabilitation solutions increased from US\$0.2 billion in 2018 to US\$3.3 billion in 2024, representing a CAGR of 53.6%, and this market is expected to further reach US\$22.0 billion in 2030, representing a CAGR of 37.5%. The penetration rate of intelligent rehabilitation solutions within the broader the global rehabilitation product market rose from 1.0% in 2018 to 6.9% in 2024.

Global intelligent rehabilitation solutions market size, 2018-2024, 2025E-2030E

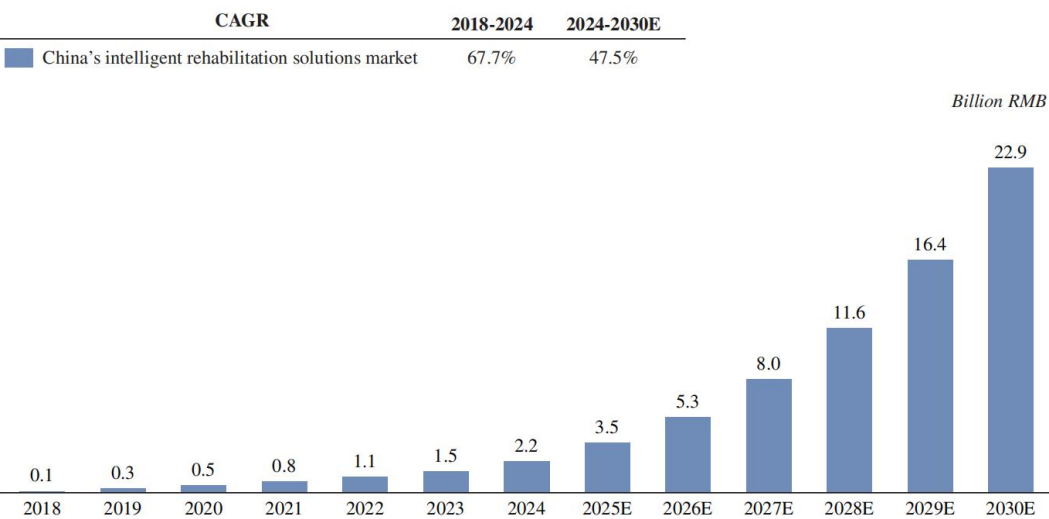


Note: By sales revenue, in terms of ex-factory prices.

Source: annual reports published by market players, interviews with industry experts, CIC Reports

China's intelligent rehabilitation solutions market increased from RMB0.1 billion in 2018 to RMB2.2 billion in 2024, representing a CAGR of 67.7%, and this market is expected to further reach RMB22.9 billion in 2030, representing a CAGR of 47.5%. The penetration rate of intelligent rehabilitation solutions in China grew from 0.3% in 2018 to 2.3% in 2024. In 2030, the penetration rate in China is expected to reach 10.8%, indicating the untapped growth potential.

China's intelligent rehabilitation solutions market size, 2018-2024, 2025E-2030E



Note: By sales revenue, in terms of ex-factory prices.

Source: annual reports published by market players, interviews with industry experts, CIC Reports

2. Key Growth Drivers and Trends

2.1 Key Drivers

China's Medical Device Market

Aging population and rising chronic diseases. The expanding 65-and-over population will lift surgical case volumes and sustain steady demand for sports medicine diagnostic, operative and rehabilitation devices.

Strong supportive policies and oversight. The 14th Five-Year Plan targets global leadership by 2035, with policies promoting innovation, regulatory efficiency and IP protection to support high-quality industry development.

Improving affordability and increasing health awareness. With over 95% insurance coverage and improving reimbursement, patients' affordability and preventive health awareness are rising, increasing utilization of diagnostic, surgical and rehabilitation equipment.

China's Sports Medical Device Market

The penetration of arthroscopic surgeries—which stood under 50% for sports injuries and degenerative diseases in 2024—is poised for growth, driven by shifting clinical awareness and improving

affordability.

China's VBP scheme has mitigated historical cost constraints. Previously, high prices forced surgeons to substitute implants with cheaper alternatives like sutures; post-VBP, price elasticity has unlocked a distinct trend toward higher implant volume per procedure.

China's Sports Medical Implants Market

Rising participation in moderate-to-high physical activity across the general population has lifted the overall risk of sports-related injuries. China's elderly population, many of whom live with chronic illnesses, drive structural demand for osteoarthritis and osteoporosis therapeutics.

Progress in surgical methods has improved the safety, precision and ease of the use of medical implants, thereby driving the adoption of sports medical implants.

Improved sports medicine discipline construction and talent training. The enhanced awareness of preventive care among patients helps to accelerate adoption of advanced medical implants and supports the growth of the sports medical implants market.



China's Sports Medical Surgical Equipment and Associated Medical Consumables Market

Imaging technology advancing to higher resolutions provides clearer and more accurate color representation, and further improves surgical accuracy and patient safety.

The Chinese government implements various policies that support for adopting domestically produced surgical.

With the advancement of minimally invasive surgical techniques, as well as the expanding patients suffering from sports-related injuries and a growing pool of specialized physicians, the demand for sports medical devices is expected to rise rapidly.

China's Sports Medicine Regenerative Medicine Devices market

Innovative technologies are increasingly being integrated into clinical practice and greatly improve healing potential for soft tissue injuries, cartilage defects, and tendon degeneration.

The rising prevalence of degenerative diseases is expected to drive the development of the sports medicine regenerative medicine devices market.

Surgeons and patients are growing cognizant of regenerative sports medicine devices, which shift tissue care from conventional repair to native tissue regeneration. Enhanced training programs, workshops and live hands-on demos have boosted clinicians' proficiency with these tools, broadening patient access to cutting-edge restorative orthopedic therapies.

2.2 Key Trends of China's Medical Device

Technological innovation: Advances in AI, 5G, cloud computing and bioengineering are enabling smarter, more efficient and interoperable devices, improving clinical outcomes and cost-effectiveness.

Domestic substitution: Volume-based procurement has accelerated domestic substitution, supporting competitive local manufacturers, driving consolidation and increasing market share for cost-efficient and innovative players.

2.3 Entry Barriers

Market access and regulatory barriers

Strict licensing, GMP/ISO compliance and clinical evaluation requirements, particularly for Class II and III devices, create high

regulatory costs and complexity for new entrants.

Technical barriers.

Medical device development requires multidisciplinary integration, advanced manufacturing standards and long development cycles, posing significant technical and capital challenges for new players.

Talent barriers

The industry requires multidisciplinary expertise across R&D, manufacturing, quality and commercialization, and the scarcity of experienced professionals in these areas poses a significant barrier for new entrants.

Market channel barriers

Complex hospital tendering, regulatory and service requirements domestically, as well as distributor networks and brand recognition overseas, create substantial market access and expansion challenges.

2.4 Future Outlook

The sports medicine device market in China has been dominated by international players over the past decade. However, domestic brands have increasingly enhanced product quality and



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effectiveness. Fueled by technological advances, supportive regulatory policies and rising public health awareness, China's sports medicine market holds massive growth potential.



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CIC Reports & Industry Overview

At CIC, we employ a rigorous, multi-method research framework, combining primary and secondary sources to underpin our analysis. Primary research involves in-depth engagements with industry thought leaders and practitioners, particularly in supply chain finance. Secondary research synthesizes publicly available datasets from authoritative bodies, including the National Bureau of Statistics of the People's Republic of China, the State Administration of Financial Regulation (SAFR, formerly the China Banking and Insurance Regulatory Commission), the China Securities Regulatory Commission (CSRC), and public company filings. We apply proprietary data analytics frameworks to process collected information, validating findings through cross-referencing data from multiple research streams to ensure analytical rigor and reliability.

All statistical data presented is verifiable and grounded in information available as of the date of this report.



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Extracts are refined summaries of in-depth CIC industry research reports, highlighting supply and demand trends, key growth drivers, R&D trends and future outlook, etc. of various segmented fields, integrating multi-dimensional insights such as expert interviews, market surveys and industry data analysis.

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