

**Exhibit 4-4**

**Orthopedic Biomaterials Market by Segment, 2002-2012**  
**(Allograft Products, Ceramic Products, Polymer Products, rhBMP Products, HA**  
**Viscosupplemental Products) (in millions of dollars)**

<b>Year</b>	<b>Allograft Products</b>	<b>Ceramic Products</b>	<b>Polymer Products</b>	<b>rhBMP Products</b>	<b>HA Visco-supplemental Products</b>	<b>Total Market</b>
2002						
2003						
2004						
2005						
2006						
2007						
2008						
2009						
2010						
2011						
2012						

  

<b>Year</b>	<b>Allograft Products</b>	<b>Ceramic Products</b>	<b>Polymer Products</b>	<b>rhBMP Products</b>	<b>HA Visco-supplemental Products</b>	<b>Total Market</b>
2002-2006						
2006-2012						

Source: Kalorama Information, Inc.

There are no single-injection treatments currently available in the US. In Europe, however, Q-Med's Durolane, a single-injection treatment, has successfully penetrated several markets because of its one-shot regimen. Q-Med has submitted an FDA premarket (PMA) application for Durolane for a single- injection treatment in the US.

In June 2007, XXXX announced that it has submitted a PMA for FDA approval in the US for a single-injection viscosupplementation treatment, XXXX. At present most products currently available, including XXXX's current product XXXX, consist of three to five injections. XXXX is administered using a single high dose injection, which is equivalent in volume to three doses of XXXX's existing product. XXXX claims that the injection relieves pain caused by of the knee OA for up to six months.

### **HA Viscosupplemental Competitors' Market Share**

There are more than XX viscosupplement products available worldwide from a wide array of manufacturers/distributors. However, the majority market share in this market segment is held by a small group of XX competitors. Collectively, these top competitors hold more than XX% of the market. See Exhibit 4-26.

The top selling viscosupplemental product is XXXX manufactured by XXXX Corporation, which held XX%, or \$XX xxxx, of this market in 2006. XXXX is approved in more than XX countries worldwide for the treatment of pain associated with osteoarthritis of the knee, and is also approved in the European Union and Canada to treat pain from osteoarthritis of the hip. One of the reasons for XXXX's success is it is the only viscosupplement on the US market that can provide up to XX months of pain relief with three injections per treatment regimen. As noted earlier, XXXX has submitted has submitted a PMA for FDA approval in the US for a single-injection viscosupplementation treatment, XXXX.