

Intraoperative Neuromonitoring (IONM) Market - Global Outlook and Forecast 2017 - 2022

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Abstracts

SpecialtyCare, Natus, NuVasive, Medtronic, and inomed Medizintechnik GmbH are the leading players in the global intraoperative neuromonitoring (IONM) market. The global IONM market is expected to cross \$4 billion, growing at a CAGR close to 7.8% during 2016–2022. The market for IONM is relatively entrenched in developed countries, especially in the US and Europe. North America will lead the market and the US will have the maximum share (90%) of the total market share in the region. The orthopedic surgery segment is likely to post the highest growth CAGR in the application segment, whereas the neurosurgery segment will remain the largest market. The EP segment will dominate the market during the forecast period.

Report Timeline

Base Year: 2016

Forecast Year: 2017–2022

Major vendors profiled in the report are as following:

SpecialtyCare

Natus

NuVasive

Medtronic

inomed Medizintechnik GmbH

Other emerging vendors are Accurate Monitoring, Cadwell Industries, Computational Diagnostics, Bromedicon Neuromonitoring, Clinical Neurodiagnostics, CNS Neuromonitoring, Dr. Langer Medical GmbH, IntraNerve, Medsurant Health, Neuro Alert, Neurophysiology Services Asia, Nihon Kohden Corporation.

SCOPE OF THE REPORT

The study considers the present scenario of the global IONM Market and its market dynamics for the period 2016-2022. It covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. The report also profiles and analyzes the leading five companies and 15 other prominent companies operating in the market.

The sale of major IONM market companies was aggregated to arrive at the market size. The same approach is used to calculate the market size in terms of revenue. An estimated 85-90% of vendors' capacity are mapped and considered in the calculations.

The report provides the analysis of the key segments of the market by end-users, geography, and vendors. It provides a detailed analysis of revenue from various segments:

Source Types

In-sourced

Outsourced

Methodology Types

Evoked Potential (EP)

Electromyography (EMG)

Electroencephalography (EEG)

Application Types

Neurosurgery

Orthopedic surgery

ENT surgery

Cardiovascular surgery

Major Geographies

APAC

EMEA

Latin America

North America

The report provides a holistic view of the global IONM market, the companies involved in the market, and the factors driving its growth. It also provides information on some of the latest trends that have started to surface and are likely to become strong market driving forces over the next five years. This report also provides the Porter's Five Forces analysis along with a description of each force and its impact on the market. Further, the report also provides complete value chain analysis of the global market.

IONM Market: Key Vendor Analysis

Vendors majorly focus on merger & acquisition to strengthen their presence

The global market can be termed as attractive one because of the growth prospects it

holds. Mergers and acquisition are the major strategies used by vendors in the market. The report includes the news and details of the key mergers and acquisition of major vendors in the industry.

IONM Market Dynamics

Advent of portable and multi-modality IONM devices to boost the market

Increase in volume of surgical procedures, growing utility of intraoperative neuromonitoring in varied surgeries, technological innovations and increase in use of out-sourced Intraoperative neuromonitoring by small and rural healthcare centers are the major factors that are enhancing the growth of the market. Increasing demand for tele-neuromonitoring, advent of portable and multi-modality IONM devices, increase in strategic consolidations and integration of MI surgeries with intraoperative neuromonitoring are the latest trends that will boost the market and will pave the way for growth opportunities.

IONM Market: Segmental Overview

Neurosurgery segment is going to dominate the market during the forecast period

Outsourced intraoperative neuromonitoring is growing at a rapid pace due to its benefits over in-sourced monitoring. Hospitals prefer outsourced monitoring as it eliminates the need for purchase of premium priced Intraoperative neuromonitoring capital equipment and avoid the requirement to appoint full-time IONM professionals.

In terms of modality, the EP segment dominated the market with a major share of 68.25% of the global IONM market due to its broad range of surgical applications and the high utilization rate. This segment is anticipated to be driven at a slightly growth rate during 2016?2022 and will retain to be major segment of the global Intraoperative neuromonitoring market by modality type during the forecast period. In terms of the growth rate, orthopedic surgeries are likely to grow at a higher CAGR than other surgical types. However, neurosurgery will remain the major revenue contributor during the forecast period in the application segment.

IONM Market: Geographical Analysis

IONM market in North America to be the largest market

The primary factor for the high share of North America in the global IONM market is the existence of the favorable and constantly improving reimbursement scenario in the region. The penetration of Intraoperative neuromonitoring devices is significantly higher in the US than other developed or developing countries worldwide. Their demand in this region is also rapidly growing increased in rate of utilization of IONM for varied surgeries and due to increase in demand for out-sourced services. Europe is the second largest market, followed by APAC, Latin America, and MEA.

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