

# Cerebrospinal Fluid Management - Market Insights, Competitive Landscape and Market Forecast–2026

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## Abstracts

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Cerebrospinal Fluid Management Market By Product Type (Csf Shunts & Valves, External Drainage Systems [Drainage And Monitoring Systems, Drainage-Specific Systems, And Csf Drainage Catheters {Ventricular, Lumbar, And Others}], Anti-Siphon Devices, And Others), By Age Group (Adult And Pediatric), By End User (Hospitals And Specialty Clinics), by geography is expected to grow at a steady CAGR forecast till 2026 owing to the rising prevalence of hydrocephalus due to brain tumors and road accidents

Global Cerebrospinal Fluid Management Market was valued at USD XX billion in 2020, growing at a CAGR of 4.78% during the forecast period from 2021 to 2026 to reach XX billion by 2026. The demand for CSF management is witnessing growth due to the rising number of accident and trauma cases, growing prevalence of brain tumors, increasing cases of childhood hydrocephalus, rising demand for technologically advanced products, and increasing geriatric population are expected to drive the product demand in the global CSF management market.

Cerebrospinal Fluid Management Market Dynamics:

The cerebrospinal fluid (CSF) management market is witnessing an increase in market revenue owing to the rising prevalence of brain tumors. Brain tumors are associated with the accumulation of CSF in the brain which ultimately result in the increase of the intracranial pressure inside the brain. As per the GLOBOCAN study published by the International Agency for Research on Cancer published in 2020, brain cancers accounted for 308, 102 cases across the globe in 2020. The excess fluid puts pressure

on the brain, which can damage it. Therefore, in order to avoid the fluid buildup inside the brain, CSF management devices such as CSF shunts and drainage systems are employed. Therefore, the rising global prevalence of brain tumors is expected to result in the growing demand for CSF management devices, thereby aiding in the global CSF management market growth.

Increasing cases of road traffic injuries can be considered as another key factor responsible for the growth of the CSF management devices market. According to the World Health Organization factsheet (2021) on road traffic injuries, injuries associated with road accidents are the leading cause of fatality in children and young adults belonging to the age group 5-29 years across the globe. The same factsheet further stated that near about 20-50 million people suffer from non-fatal injuries in road accidents resulting in a disability as a result of their injury. Injuries of this nature may result in severe head trauma. This may result in formation of blood clots inside the brain which may restrict the flow of CSF inside the brain. This in turn leads to the accumulation of CSF inside the brain, which in turn would be treated with the help of CSF management devices. Therefore, the increase in the cases of road traffic injuries and accidents is expected to contribute in the growing demand for cerebrospinal fluid management devices, eventually taking the global cerebrospinal fluid management market forward during the forecast period from 2021-2026.

However, stringent product approval process, common risks associated with the devices such as infection, shunt malfunction, and improper drainage, among others may prove to be certain restraints to the CSF management market growth.

Along with the above-mentioned factors, the global cerebrospinal fluid management market witnessed a period of temporary setback as necessary measures to contain the COVID-19 spread were imposed such as country-wide lockdowns. One of the major steps during this was the suspension of numerous elective procedures and outpatient visits which reduced the demand for CSF management devices in the market as a large number of surgeries across different medical specialties were suspended on account of either being non-essential or several of intensive care units were closed because of the reduction in number of patient during the initial lockdown period, thereby limiting the market growth for a short time. However, the market for CSF management devices is on the period of recovery with the resumption of activities across various domains including healthcare services owing to the approval and administration of numerous COVID-19 vaccines across the globe, thereby presenting a positive future outlook for the cerebrospinal fluid management market during the forecast period from 2021-2026.

## Cerebrospinal Fluid Management Market Segment Analysis:

Cerebrospinal Fluid Management Market by Product Type (CSF Shunts & Valves, External Drainage Systems [Drainage and Monitoring Systems, Drainage-specific Systems, and CSF Drainage Catheters {Ventricular, Lumbar, and Others}], Anti-Siphon Devices, and Others), by Age Group (Adult and Pediatric), by End User (Hospitals and Specialty Clinics), and by Geography (North America, Europe, Asia-Pacific, and Rest of the World)

In the product segment of the CSF management market, the CSF shunts and valves are expected to account for a significant revenue share in the market during the forecast period. This can be attributed to their applicability in the treatment of hydrocephalus as they are most commonly placed in pediatric patients for hydrocephalus/fluid space collections due to intraventricular hemorrhage or spina bifida and have significantly improved clinical outcomes associated with these conditions. Furthermore, they offer a more permanent treatment approach compared to other CSF management devices as they are intended to remain in place for life.

Additionally, the technological advancement in product development such as the development of newer shunts with an electronically (externally) programmable component that would help avoid over-drainage of CSF may be another key factor positively influencing the demand for this product type in the CSF management market.

North America is expected to dominate the Overall Cerebrospinal Fluid Management Market:

Among all the regions, North America is estimated to account for the significant market share in the CSF management market. North America is predicted to account for the dominant market share because of the high prevalence of hydrocephalus from various reasons such as congenital hydrocephalus, brain aneurysms, traumatic brain injury among other factors, rising population of the elderly as well as high awareness among people regarding disease management and the new product launches in the region.

The North America CSF management market is witnessing an upward trend due to the rising prevalence of congenital hydrocephalus in the country among other factors. As per the data provided by the Centers for Disease Control and Prevention, each year, about 1,427 babies are born with spina bifida, or 1 in every 2,758 births in the country. Many babies born with spina bifida also develop hydrocephalus which may boost the demand for CSF management devices such as hydrocephalus shunts, eventually

driving the United States CSF management market growth during the forecast period.

Additionally, according to the data (2020) provided by the Brain Aneurysm Foundation, a US-based organization, an estimated 6.5 million people in the United States have an un-ruptured brain aneurysm. The annual rate of rupture in the country is approximately 8 – 10 per 100,000 people. About 30,000 people in the United States suffer a brain aneurysm rupture each year. A brain aneurysm ruptures every 18 minutes. It has been established that blood from a torn aneurysm can result in the blockage of CSF circulation leading to fluid buildup and increased pressure on the brain ultimately causing hydrocephalus. Therefore, the increase in number of patients suffering from brain aneurysms in the country is expected to drive the demand for CSF management devices, thereby contributing in the overall growth of the CSF management market in the North American region.

The above-mentioned facts point towards the presence of diverse patient pool in the country as well as the North American region that may benefit from the utilization of CSF management. Furthermore, the well-established patient care system along with awareness among patients and caregivers regarding different types of neurosurgeries and products used is further expected to aid in the North American CSF management market growth.

Moreover, the prompt and well-established healthcare services and infrastructure further contributes to the growth of the regional CSF management market. The presence of key players in the region and supportive reimbursement programs further provide immense growth opportunities for CSF management market. Moreover, the constant focus of market players in targeting the region in product launch is further expected to aid in the growth of the North American CSF management market. For instance, in December 2019, Raumedic AG launched a new device for home use, Raumed Home ICP for intracranial pressure (ICP) monitoring in hydrocephalus patients.

#### Cerebrospinal Fluid Management Market Key Players:

Some of the key market players operating in the CSF management market includes Medtronic, B. Braun Melsungen AG, Neuromedex GmbH, Natus Medical Incorporated., Sophysa, Integra LifeSciences Corporation, Spiegelberg GmbH & Co. KG, Desu Medical, Polyganics, CHRISTOPH MIETHKE GMBH & CO. KG, HpBio Proteses Inc, Wellong Instruments Co., Ltd., M?ller Medical GmbH, CereVasc, Inc., Anuncia Inc, RAUMEDIC AG, Vivonics Inc and others.

## Recent Developmental Activities in Cerebrospinal Fluid Management Market:

In March 2021, Anuncia Inc. received the 'Breakthrough Device Designation' for ReFlow™ System Mini by the US FDA. The device is to be used in the treatment of CSF disorders requiring shunting such as hydrocephalus.

In May, 2020, Aesculap, Inc. announced the launch of M.blue™ Hydrocephalus Valve in the United States. The device is equipped with a unique gravitational technology integrated with a fixed differential pressure unit in one valve, thereby providing a simple, position-dependent solution.

In July 2019, Integra LifeSciences Holdings Corporation acquired Arkis Biosciences Inc. thereby also acquiring a portfolio of neurosurgical devices, including the CerebroFlo external ventricular drainage (EVD) catheter with Endexo technology.

## Key Takeaways from the Cerebrospinal Fluid Management Market Report Study

Market size analysis for current CSF management market size (2020), and market forecast for 5 years (2021-2026)

The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the CSF management market.

Top key product/services/technology developments, merger, acquisition, partnership, joint venture happened for last 3 years

Key companies dominating the global CSF management market.

Various opportunities available for the other competitor in the CSF management market space.

What are the top performing segments in 2020? How these segments will perform in 2026.

Which is the top-performing regions and countries in the current CSF management market scenario?

Which are the regions and countries where companies should have concentrated on

opportunities for CSF management market growth in the coming future?

Target Audience who can be benefited from this Cerebrospinal Fluid Management Market Report Study

Cerebrospinal Fluid Management products providers

Research organizations and consulting companies

Cerebrospinal Fluid Management-related organizations, associations, forums, and other alliances

Government and corporate offices

Start-up companies, venture capitalists, and private equity firms

Distributors and Traders dealing in CSF management

Various End-users who want to know more about the CSF management market and latest technological developments in the CSF management market.

Frequently Asked Questions for Cerebrospinal Fluid Management Market:

1. What is a CSF Management Device?

CSF management devices are used in the treatment of CSF accumulation and leakage in events of hydrocephalus and injuries due to various reasons such as birth defects, trauma, and other causes. These include devices such as CSF shunts, dural sealants, and intracranial pressure monitoring devices among others.

2. What is the market for Global Cerebrospinal Fluid Management?

Global Cerebrospinal Fluid Management Market was valued at USD XX billion in 2020, growing at a CAGR of 4.78% during the forecast period from 2021 to 2026 to reach XX billion by 2026.

3. What are the drivers for Global Cerebrospinal Fluid Management Market?

The demand for CSF management is witnessing growth due to the rising number of

accident and trauma cases, growing prevalence of brain tumors, increasing cases of childhood hydrocephalus, rising demand for technologically advanced products, and increasing geriatric population are expected to drive the product demand in the global CSF management market.

#### 4. Who are the key players operating in Global Cerebrospinal Fluid Management Market?

Some of the key market players operating in the CSF management market includes Medtronic, B. Braun Melsungen AG, Neuromedex GmbH, Natus Medical Incorporated., Sophysa, Integra LifeSciences Corporation, Spiegelberg GmbH & Co. KG, Desu Medical, Polyganics, CHRISTOPH MIETHKE GMBH & CO. KG, HpBio Proteses Inc, Wellong Instruments Co., Ltd., M?ller Medical GmbH, CereVasc, Inc., Anuncia Inc, RAUMEDIC AG, Vivonics Inc and others.

#### 5. Which region has the highest share in Cerebrospinal Fluid Management market?

North America is predicted to account for the dominant market share because of the high prevalence of hydrocephalus from various reasons such as congenital hydrocephalus, brain aneurysms, traumatic brain injury among other factors, rising population of the elderly as well as high awareness among people regarding disease management and the new product launches in the region.

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