

Vagus Nerve Stimulator (VNS) - Market Insights, Competitive Landscape and Market Forecast-2027

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Abstracts

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Vagus Nerve Stimulators Market By Product Type (Invasive VNS Devices And Non-Invasive VNS Devices), By Application (Migraine, Epilepsy, Depression, And Others), By End User (Hospitals, Specialty Clinics, And Others), and by geography is expected to grow at a steady CAGR (forecast period- 2022-2027) owing to increasing prevalence of neurological disorders and growing popularity of non-invasive VNS devices

Global vagus nerve stimulators market was valued at USD 426.22 million in 2021, growing at a CAGR of 9.06% during the forecast period from 2022 to 2027 to reach USD 717.17 million by 2027. The demand for vagus nerve stimulators is witnessing a surge primarily due to the rising prevalence of neurological diseases such as epilepsy, headache disorders such as migraine, and others that have proven to receive benefit from the VNS therapy, increasing popularity of VNS therapy as an alternative or even conjunctive treatment in cases where drug resistance develops, growing research in studying the effects of VNS on other indications such as tinnitus and chronic pain besides the approved ones, technological advancements leading to the development of new products such as non-invasive VNS devices thereby boosting the growth of the vagus nerve stimulators market during the forecast period from 2022-2027.

Vagus Nerve Stimulators Market Dynamics:

The vagus nerve stimulators market is experiencing an increase in product demand for a variety of reasons with one of the key reasons being the rising prevalence of neurological disorders. As per the data cited by the World Health Organization (WHO) (2022), over 50 million people across the globe suffer from epilepsy. The source further

stated that the estimated proportion of the general population with active epilepsy (i.e. persistent seizures or that require treatment) at any given time is between 4 and 10 per 1000 people. Additionally, in another factsheet by the WHO, it was stated that approximately 264 million people suffer from depression globally. Neurological indications such as epilepsy and depression can be extremely debilitating for patients and are often become refractory to pharmacological treatments. Moreover, pharmacological treatments in such indications are often accompanied with severe side-effects.

Owing to these, an alternative approach such as vagus nerve stimulation has been a preferred mode of treatment in drug-resistant cases of depression, epilepsy as well as it is also being administered in combination with pharmacological treatments in order to provide synergistic effect to patients. Vagus nerve stimulation has been reported to provide positive results in terms of preventing seizures in epileptic patients. Additionally, many studies reported that patients who received vagus nerve stimulation for epilepsy, showed clinical improvement with depression unrelated to the effect of the VNS on their seizures with nearly 40-50% improvement in patients with non-psychotic major depression.

Moreover, with more positive results being reported concerning the VNS therapy, more research is being conducted on different disease areas which may further expand the application of vagus nerve stimulation in coming years. For instance, several studies are ongoing in studying the effects of VNS on tinnitus, irritable bowel syndrome, and chronic pain among other indications. This further presents an opportunity for making significant headway in the VNS market in the near future.

However, procedure-related complications and high cost of these devices may be confining factors for the vagus nerve stimulators market growth.

Along with the factors mentioned above, the vagus nerve stimulators market witnessed a period of slow growth due to the COVID-19 pandemic. The lockdown implemented by various governments worldwide to curb the spread of the COVID-19 infection resulted in suspension of various surgeries and outpatient consultations across all medical specialties including specifically impacting elective procedures. This led to a considerable decrease in the demand for VNS devices as VNS procedures were classified under elective procedures. Furthermore, the implementation of global lockdown in varying degrees further affected the procurement and supply chain. However, the approval of various COVID-19 vaccines and the implementation of mass vaccination programs have paved the way for resumption of vagus nerve stimulators

demand, thereby providing a positive growth environment for the vagus nerve stimulators market during the forecast period.

Vagus Nerve Stimulators Market Segment Analysis:

Vagus Nerve Stimulators Market by Product Type (Invasive VNS Devices and Non-Invasive VNS Devices), by Application (Migraine, Epilepsy, Depression, and Others), by End User (Hospitals, Specialty Clinics, and Others), and by Geography (North America, Europe, Asia-Pacific, and Rest of the World).

In the product segment of the vagus nerve stimulators market, the non-invasive VNS devices category is expected to register a healthy CAGR in the vagus nerve stimulators market during the forecast period. This can be attributed to the advantages offered by these devices over their counterparts. Implantable VNS devices are often associated with adverse events encompassing both-the surgical procedure and the electrical stimulation itself. Therefore, the non-invasive VNS (nVNS) devices were developed with the aim to address the shortcomings associated with the invasive VNS devices.

Subsequently, non-invasive VNS (nVNS) delivery options that eliminate the need for surgical implantation were developed. These VNS delivery systems help in avoiding surgery-related adverse events such as infections and cardiac complications. Additionally, nVNS devices further help in addressing limitations of implantable VNS devices such as the continuous on-off stimulation cycle of implantable devices as the nVNS devices can be adjusted to balance tolerability and efficacy by end users. A few of the non-invasive vagus nerve stimulators that are currently available for commercial use are gammaCore, Sapphire by electroCore and Parasym device by Parasym Ltd.

Thus, all the above-listed factors are likely to propel the growth of the market for non-invasive VNS devices, ultimately driving the growth of the overall vagus nerve stimulators market.

North America is expected to dominate the overall Vagus Nerve Stimulators Market:

Among all the regions, North America is estimated to account for the largest share in the vagus nerve stimulators market. The key driving factors of the North America vagus nerve stimulators market are high prevalence of epilepsy, depression in the region, increasing disposable income, and rising investments and big collaborative expansions by key players in the region. Moreover, the conducive regulatory environment in the region are expected to establish the dominance of North America VNS market in the

overall global landscape.

One of the key driving factors of the United States vagus nerve stimulators market is the interplay of various factors in the country. This domination is due to the increase in epileptic population, increasing prevalence of headache disorders such as migraine, and depression in the country. Furthermore, extensive research and development activities pertaining to product development and conducive regulatory environment further helps product manufacturers to generate more revenue from the country.

For instance, as per the data cited by the National Headache Association (2022), approximately 40 million American are living with migraine and headache disorders in the country. Therefore, the presence of large patient population suffering from migraine and headache disorders correlates to the presence of a potential patient population that may resort to using VNS devices as a treatment method, thus driving the product demand in the nation. Moreover, increasing epileptic population is also expected to drive the demand for vagus nerve stimulators in the country. For instance, as per the data provided by the Centers for Disease Control and Prevention (2020), in 2015, about 3.4 million people across the nation were diagnosed with epilepsy of which 470,000 were children. As mentioned by the International League Against Epilepsy, one-third of epileptic patient population continue to have seizures despite being on anti-seizure medication. This presents another opportunity for VNS devices as they have been reported and approved for medical use for treating drug-resistant epilepsy.

Also, advanced product launches and commercialization agreements among the key companies are further expected to fuel the market. For instance, in August 2021, the US Food and Drug Administration approved drug-free rehabilitation system intended to treat moderate to severe upper extremity motor deficits associated with chronic ischemic stroke—a stroke caused by a blockage of blood flow to the brain with long-lasting symptoms the first-of-its kind VNS device- the MicroTransponder Vivistim Paired VNS System. Thus, the interplay of all the aforementioned factors are likely to fuel the market growth of vagus nerve stimulators in the United States during the forecast period

Besides United States, product development activities in Canada also provide supportive growth opportunities for the North America vagus nerve stimulators market. For instance, the Canadian Health regulatory body Health Canada authorized the Dolphin vagus nerve stimulator for emergency use in the treatment of COVID-19 induced acute respiratory distress syndrome.

Thus, all these activities point towards the presence of conducive growth environment in

the North American region, ultimately influencing the market growth of this regional market.

Vagus Nerve Stimulators Market Key Players:

Some of the key market players operating in the vagus nerve stimulators market includes LivaNova, Soterix Medical Inc, MicroTransponder Inc, Parasym Ltd, electroCore, tVNS Technologies GmbH and others.

Recent Developmental Activities in Vagus Nerve Stimulators Market:

In August 2021, the US Food and Drug Administration approved the MicroTransponder Vivistim Paired VNS System, a one-of-its-kind, drug rehabilitation system with the intention to treat moderate to severe upper extremity motor deficits associated with chronic ischemic stroke.

In March 2020, LivaNova received the CE Mark approval for their Vagus Nerve Stimulation Therapy® (VNS Therapy) System, Symmetry™ for difficult-to-treat depression.

Key Takeaways from the Vagus Nerve Stimulators Market Report Study

Market size analysis for current vagus nerve stimulators market size (2021), and market forecast for 5 years (2022-2027)

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

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

Key companies dominating the global vagus nerve stimulators market.

Various opportunities available for the other competitor in the vagus nerve stimulators market space.

What are the top performing segments in 2021? How these segments will

perform in 2027.

Which is the top-performing regions and countries in the current vagus nerve stimulators market scenario?

Which are the regions and countries where companies should have concentrated on opportunities for vagus nerve stimulators market growth in the coming future?

Target Audience who can be benefited from this Vagus Nerve Stimulators Market Report Study

Vagus nerve stimulators products providers

Research organizations and consulting companies

Vagus nerve stimulators-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 vagus nerve stimulators

Various End-users who want to know more about the vaginal rejuvenation systems market and latest technological developments in the vaginal rejuvenation systems market.

Frequently Asked Questions for Vagus Nerve Stimulators Market:

1. What is a Vagus Nerve Stimulator?

A vagus nerve stimulator is a pacemaker like device which comes with an implantable programmable generator that is implanted in the chest wall and delivers electrical impulses to the vagus nerve in the neck thereby stimulating the vagus nerve and providing relief to patients.

2. What is the market for Global Vagus Nerve Stimulators?

Global vagus nerve stimulators market was valued at USD 426.22 million in 2021, growing at a CAGR of 9.06% during the forecast period from 2022 to 2027 to reach USD 717.17 million by 2027.

3. What are the drivers for Global Vagus Nerve Stimulators Market?

The demand for vagus nerve stimulators is witnessing a surge primarily due to the rising prevalence of neurological diseases such as epilepsy, headache disorders such as migraine, and others that have proven to receive benefit from the VNS therapy, increasing popularity of VNS therapy as an alternative or even conjunctive treatment in cases where drug resistance develops, growing research in studying the effects of VNS on other indications besides the approved ones, technological advancements leading to the development of new products such as non-invasive VNS devices thereby boosting the growth of the vagus nerve stimulators market during the forecast period from 2022-2027.

4. Who are the key players operating in Global Vagus Nerve Stimulators Market?

Some of the key market players operating in the vagus nerve stimulators market includes LivaNova, Soterix Medical Inc, MicroTransponder Inc, Parasym Ltd, electroCore, tVNS Technologies GmbH and others.

5. Which region has the highest share in Vagus Nerve Stimulators market?

Among all the regions, North America is estimated to account for the largest share in the vagus nerve stimulators market. The key driving factors of the North America vagus nerve stimulators market are high prevalence of epilepsy, depression in the region, increasing disposable income, and rising investments and big collaborative expansions by key players in the region. Moreover, the conducive regulatory environment in the region are expected to establish the dominance of North America VNS market in the overall global landscape.

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