

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-invasive Intracranial Pressure (ICP) Monitoring Devices market size is expected to reach \$ 187 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

Non-invasive intracranial pressure (ICP) monitoring devices assess ICP-related dynamics without skull penetration or catheter placement by acquiring external or physiological surrogate signals and performing onboard processing, waveform quality control, feature extraction, and interpretation. Typical architectures combine a sensing front end (sensor/probe/adhesive fixtures) with an analysis console (algorithms, display/alarms, data handling, and connectivity). Compared with invasive monitoring, outputs are more often trends, surrogate waveforms, and risk-oriented metrics rather than catheter-equivalent absolute ICP values. The primary value proposition is scalable, repeatable bedside assessment with lower operational and complication burdens, supporting emergency screening, transport and ICU adjunct use, and follow-up in patients who are not candidates for invasive access. In 2025, global Non-invasive Intracranial Pressure (ICP) Monitoring Devices production reached approximately 12 K Units and price is about 10 K USD/Unit. The average gross profit margin of this product is 50%.

Neurocritical and emergency-care workflows increasingly demand earlier detection, faster stratification, and reproducible decision pathways for intracranial risk. Non-invasive ICP devices can provide lower-risk intracranial dynamic signals for emergency screening, in-hospital transport, resource-limited settings, and selected high-risk populations, helping clinicians coordinate imaging prioritization and monitoring escalation. At the same time, multimodal brain monitoring elevates trend visibility and

waveform morphology as actionable information, and some systems are positioned to monitor variation and compliance change via surrogate waveforms and parameters—creating an upgrade space that spans hardware, algorithms, quality control, and interoperable data handling. The key barriers are evidence closure and misuse risk. Surrogate-signal approaches are sensitive to anatomical variability, measurement-window constraints, operator dependence, posture changes, and motion artifacts—making repeatability within the same patient and generalizability across populations decisive commercialization hurdles. If trend or risk outputs are misinterpreted as catheter-equivalent absolute ICP, delayed or unnecessary interventions can occur; therefore, clear indication boundaries, interpretable outputs, and visible quality-control workflows are essential. Clinical practice discussions also emphasize that when absolute pressure is required for critical decisions, surrogate outputs should not be treated as direct substitutes for invasive reference monitoring. Demand is shifting from “can it measure” to “can it be operationalized, user-friendly, and auditable.” Emergency care prioritizes rapid bedside screening and consistent short-interval rechecks; critical-care teams value stable continuous trends, readable surrogate waveforms, event annotation and playback, and efficient alignment with pupillary assessment, ultrasound flow proxies, ocular metrics, and imaging follow-up. Longitudinal follow-up increasingly requires cross-visit comparability and standardized training, pushing products toward lower operator dependence with built-in quality control and algorithm-assisted interpretation, alongside stronger interoperability with hospital data platforms. Upstream competitiveness is defined by the sensing and acquisition chain, fixation and skin-contact components, and the software/algorithm plus compliance framework. Skull-deformation and surrogate-waveform systems depend on high-sensitivity sensors, low-noise front-end electronics, electromagnetic robustness, and stable fixation, coupled with algorithms that derive compliance-related waveform features for interpretation. Ocular and ultrasound vascular-proxy approaches rely more on probe/optical consistency and standardized acquisition workflows to reduce operator-driven variance. Medical-grade skin-contact materials, disinfection durability validation, cybersecurity, and software lifecycle governance increasingly set the ceiling for scalable quality and repeatable deployment.

This report studies the global Non-invasive Intracranial Pressure (ICP) Monitoring Devices production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Non-invasive Intracranial Pressure (ICP) Monitoring Devices and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of

Non-invasive Intracranial Pressure (ICP) Monitoring Devices that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices total production and demand, 2021-2032, (K Units)

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices total production value, 2021-2032, (USD Million)

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Non-invasive Intracranial Pressure (ICP) Monitoring Devices domestic production, consumption, key domestic manufacturers and share

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Non-invasive Intracranial Pressure (ICP) Monitoring Devices market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Medtronic, HaiWeiKang, HeadSense Medical, Vittamed, Comen, PrimaNova, TALEND MEDICAL, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Non-invasive Intracranial Pressure (ICP) Monitoring Devices market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices Market, Segmentation by Type:

Sound Signal Monitoring

Blood Flow Signal Monitoring

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices Market, Segmentation by Monitoring Principle:

Transcranial Doppler (TCD)-based Non-invasive ICP Devices

Optic Nerve Sheath Diameter (ONSD)-based Non-invasive ICP Devices

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices Market,
Segmentation by Signal Acquisition Method:

Ultrasound-based Non-invasive ICP Monitoring Devices

Physiological Signal Modeling-based Non-invasive ICP Devices

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices Market,
Segmentation by Device Form Factor:

Portable Non-invasive ICP Monitoring Devices

Bedside Non-invasive ICP Monitoring Devices

Global Non-invasive Intracranial Pressure (ICP) Monitoring Devices Market,
Segmentation by Application:

Traumatic Brain Injury

Intracerebral Hemorrhage

Meningitis

Subarachnoid Hemorrhage

Others

Companies Profiled:

Medtronic

HaiWeiKang

HeadSense Medical

Vittamed

Comen

PrimaNova

TALEND MEDICAL

Key Questions Answered:

1. How big is the global Non-invasive Intracranial Pressure (ICP) Monitoring Devices market?
2. What is the demand of the global Non-invasive Intracranial Pressure (ICP) Monitoring Devices market?
3. What is the year over year growth of the global Non-invasive Intracranial Pressure (ICP) Monitoring Devices market?
4. What is the production and production value of the global Non-invasive Intracranial Pressure (ICP) Monitoring Devices market?
5. Who are the key producers in the global Non-invasive Intracranial Pressure (ICP) Monitoring Devices market?
6. What are the growth factors driving the market demand?

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