

Diabetic Neuropathy Management Market Size, Share & Trends Analysis Report By Devices (Electrical stimulation, Neuro Stimulation Devices), By Application (Peripheral Neuropathy), By End-use, By Region, And Segment Forecasts, 2024 - 2030

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Abstracts

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Market Size & Trends

The global diabetic neuropathy management market size was estimated at USD 2.62 billion in 2023 and is expected to grow at a CAGR of 5.8% from 2024 to 2030. Major factors contributing to the market growth include the growing prevalence of diabetes, the rising geriatric population, technological advancements, increased R&D activities, and the increase in number of product approvals. According to Centers for Disease Control and Prevention (CDC) statistics, approximately 11.6% of the U.S. population, or 38.4 million Americans, live with diabetes and are estimated that half of these individuals are likely to develop diabetic neuropathy at some point during their lifetime.

High prevalence of diabetes is the major factor driving the market growth. Diabetes, when left unmanaged, can lead to a range of serious complications, including peripheral neuropathy. According to the International Diabetes Federation (IDF), 537 million adults worldwide lived with diabetes in 2021, it further states that the number is expected to surge to 642 million by 2040. The prevalence of diabetes is increasing globally, with the most significant rises observed in low- and middle-income countries. The Western Pacific, South Asia, and Europe had the highest numbers of adults living with diabetes in 2021, at 167 million, 88 million, and 59 million respectively.

Furthermore, there is a notable increase in the number of elderly individuals prone to developing diabetic neuropathy. The geriatric population is particularly vulnerable due to factors such as longer diabetes duration, decreased nerve regeneration capacity, and comorbidities that can exacerbate neuropathic symptoms. As the global population ages, the World Health Organization (WHO) predicts that the number of people aged 60 years and older will increase by 1 in 6 by 2030, rising from 1 billion in 2020 to 1.4 billion recently. The global population of people aged 60 years, and older is expected to double to 2.1 billion by 2050, with individuals aged 80 years or older set to triple to 426 million. This demographic shift is expected to lead to a higher chance of chronic conditions like diabetes and peripheral neuropathy, increasing the risk of diabetic neuropathy among seniors.

The diabetic neuropathy management market growth is anticipated to be driven by the availability of various brain imaging technologies, including electrical stimulation devices, neurostimulation devices, nerve conduction testing devices, which offer applications for both functional and peripheral neuropathy and autonomic neuropathy. Additionally, technological advancements and manufacturers competing for product approval in key application areas drive the market forwards. In October 2023, Boston Scientific received FDA approval for its spinal cord stimulation device WaveWriter Alpha Spinal Cord Stimulator (SCS) to treat painful diabetic peripheral neuropathy (PDN), a complication of diabetes affecting the legs and feet. This expanded indication positions Boston Scientific to compete with Abbott, Medtronic and Nevro in the growing PDN market.

“The use of SCS to support a subset of the diabetes population is an important advancement for one of the fastest growing chronic conditions in the world.

This expanded indication is another testament to our commitment to delivering a robust portfolio of interventional pain solutions that provides physicians with more treatment choices to help their patients find relief.”

-Jim Cassidy, president of Neuromodulation at Boston Scientific.

Several initiatives undertaken by the government and private organizations for the awareness and treatment of neuropathy are expected to contribute to market growth. For instance, in May 2022, the US PDPN Disease Awareness Campaign, conducted by Averitas Pharma, aims to raise awareness about the significant unmet medical needs of patients with painful diabetic peripheral neuropathy (PDPN). This

campaign involves patient-focused surveys, educational materials, and media tours to increase disease awareness and encourage patients to seek appropriate treatment.

“We launched this unique contest in the community to better understand how patients describe diabetic nerve pain of their feet in their own terms.

By redefining the symptoms using their own words, our goal is to help diabetic peripheral neuropathy patients and their health care providers start using common language to talk about their symptoms, fostering more productive conversations around diagnosis, disease management and potential solutions.”

-Dr. Lizandra Marcondes, Head Medical Affairs Averitas Pharma.

Innovations in medical technology have significantly improved the diagnosis, monitoring, and treatment of diabetic neuropathy. From advanced imaging techniques that allow for early detection to novel drug delivery systems and neuromodulation therapies, these technological breakthroughs are reshaping the landscape of neuropathy management. Additionally, the integration of telemedicine and remote monitoring solutions and electrical neurostimulation devices has enhanced access to specialized care, particularly for patients in rural or underserved areas. For instance, July 2022, the FDA cleared the First Relief percutaneous electrical neurostimulation (PENS) device by DyAnsys for the treatment of chronic, intractable pain from diabetic peripheral neuropathy. The device delivers continuous pulses of low-level electrical current and is placed behind the ear. The approval was based on a clinical study that showed patients treated with First Relief experienced a significant reduction in pain intensity, as well as improvements in secondary endpoints like vibration perception, insomnia, and anxiety. The device offers a non-drug, non-narcotic treatment option for patients suffering from neuropathic pain associated with diabetic peripheral neuropathy.

“We are excited to have the FDA clearance of First Relief so that this device, which has been proven effective, can now be used to treat patients who have been experiencing pain related to diabetic neuropathy.

First Relief offers a significant treatment option without drugs or narcotics.”

-DyAnsys CEO Srinu Nageshwar.

The growing economic burden of diabetic neuropathy has led to increased

healthcare spending in this area. Governments and healthcare organizations are allocating more resources to manage this condition effectively, recognizing the long-term cost benefits of early intervention and comprehensive care. The development of non-invasive diagnostic tools using AI will enhance early detection, leading to more timely and effective treatments. In October 2023, researchers at the University of California, San Diego (UCSD) have received a grant of USD3.6 million to develop a novel combination of diagnosis and treatment for diabetic neuropathy. This project aims to create a comprehensive approach that integrates advanced diagnostic tools with targeted therapies. Further the regulatory landscape for diabetic neuropathy management is evolving, with an uptick in the approval of new drugs, devices, and treatment modalities.

Global Diabetic Neuropathy Management Market Report Segmentation

This report forecasts revenue growth at global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2018 to 2030. For this study, Grand View Research has segmented the global diabetic neuropathy management market report based on devices, application, end-use, and region:

Devices Outlook (Revenue, USD Million, 2018 - 2030)

Electrical Stimulation Devices

Neurostimulation Devices

Nerve Conduction Testing Devices

Other Devices

Application Outlook (Revenue, USD Million, 2018 - 2030)

Peripheral Neuropathy

Autonomic Neuropathy

Proximal Neuropathy

Mononeuropathy

End-use Outlook (Revenue, USD Million, 2018 - 2030)

Hospitals

Home Healthcare

Other End-use

Regional Outlook (Revenue, USD Million, 2018 - 2030)

North America

U.S.

Canada

Mexico

Europe

UK

Germany

France

Italy

Spain

Denmark

Sweden

Norway

Asia Pacific

Japan

China

India

Australia

Thailand

South Korea

Latin America

Brazil

Argentina

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

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