

Global Electrotherapy System Market, By Technology (Transcutaneous Electrical Nerve Stimulation (TENS), Neuromuscular Electrical Stimulation (NMES), Inferential Current (IFC), Percutaneous Electrical Nerve Stimulation (PENS), Electronic Muscle Stimulator (EMS), Spinal Cord Stimulation (SCS), Electro-acupuncture (EA) and Others), By Therapy (Extracorporeal Shock Wave Therapy, Ultrasound Therapy, Magnetic Field Therapy, Microcurrent Therapy, Interferential Current Therapy and Others), By Application (Chronic Wound Healing, Neuromuscular Dysfunction, Pain Management, Musculoskeletal Disorder, Tissue Repair, Physical Therapy, Iontophoresis, Others), By End User (Hospitals & Clinics, Rehabilitation Centers, Long Term Centers, Others), Country Wise Market Analysis, Key Company Profiles, Trends and Recent Developments – Forecast to 2030

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Abstracts

The global electrotherapy system market was valued at US\$ 1,153.9 Million in 2023, and the market is poised to reach US\$ 1,656.4 Million by 2030. Electrotherapy is a

medical and rehabilitation technique that employs electrical currents to stimulate muscles, improve circulation, manage pain, and promote tissue healing. By applying focused and controlled electrical stimulation, electrotherapy is a potent therapy that many physiotherapists utilize to treat conditions like chronic pain, arthritis, musculoskeletal injuries, muscle atrophy, sports injuries, nerve discomfort, and nerve pain.

Electrotherapy system offers a non-pharmacological and effective way to manage pain and enhance the quality of life. As the global population continues to age, the incidences of chronic diseases such as cancer, cardiovascular diseases, neurovascular diseases, and musculoskeletal diseases are likely to grow, thereby propelling the growth of the electrotherapy system market. According to the Centers for Disease Control and Prevention data between 2019 and 2021, the prevalence of chronic pain among US adults ranged from 20.5% to 21.8%. During 2021, an estimated 51.6 million US adults experienced chronic pain, and 17.1 million experienced high-impact chronic pain. According to the WHO, around 1.71 billion individuals globally are affected by musculoskeletal conditions. Furthermore, according to the report titled 'Spinal Cord Injury Facts and Stats', around 17,700 Americans suffer from a spinal cord injury yearly, of which 78% are men with an average age of 43. Therefore, the high incidence of chronic pain, musculoskeletal disorders and spinal cord injuries stimulates the electrotherapy system market growth. Besides, the use of electrotherapy in sports medicine and physical therapy for injury management and recovery has gained momentum, thereby driving the market growth.

Moreover, the continuous technological advancements have led to the development of more sophisticated and user-friendly electrotherapy devices. These innovations make electrotherapy systems more accessible to both healthcare providers and patients, which helps in market expansion. For instance, in March 2023, BTL Medical, a leading provider of electrotherapy devices, announced the launch of its new Tens 9000 device. The Tens 9000 is a portable, wireless TENS device that offers a variety of treatment modes and intensities.

Recent Developments

In June 2024, Enraf-Nonius, a global market leader in rehabilitation and physiotherapy equipment, expanded its premier technology portfolio to the U.S. for the first time in its 100-year history.

In February 2024, Zynex, Inc., an innovative medical technology company

specializing in the manufacture and sale of non-invasive medical devices for pain management, rehabilitation, and patient monitoring, introduced two new therapy products: the Zynex Pro Hybrid LSO and the Zynex DynaComp Cold Compression.

In November 2023, Nevro Corp. announced that it has acquired Vyrsa Technologies, a privately held medical technology company focused on a minimally invasive treatment option for patients suffering from chronic sacroiliac joint (SI Joint) pain.

By Technology: Global Electrotherapy System Market – Key Takeaways

Based on technology, the transcutaneous electrical neural stimulation (TENS) segment dominated the electrotherapy system market in 2023, and this trend is expected to continue over the forecast period. The TENS devices are commonly used for chronic pain management, including back pain, arthritis, and neuropathic pain conditions.

The spinal cord stimulation (SCS) segment captured second highest share of the global electrotherapy system market in 2023, owing to factors such as the rising incidences of spinal cord injuries, growing prevalence of musculoskeletal disorders, and increasing preference for non-invasive therapies for nerve pain management.

Neuromuscular electrical stimulation (NMES) is commonly employed in post-surgical rehabilitation, sports medicine, and physical therapy. The market growth can be attributed to the effectiveness of NMES in stimulating muscle contractions, making it a preferred choice for various therapeutic applications.

Percutaneous electrical nerve stimulation (PENS) is a minimally invasive peripheral neuromodulation approach implemented against chronic neuropathic and mixed pain. The market for PENS has been experiencing steady growth driven by factors such as the increasing prevalence of chronic pain conditions, advancements in neuromodulation technologies, and expanding applications beyond pain management to include neurological disorders such as Parkinson's disease, epilepsy, and urinary incontinence.

By Therapy: Global Electrotherapy System Market – Key Takeaways

Based on therapy, the extracorporeal shock wave therapy segment dominated the global electrotherapy system market in 2023. Extracorporeal shock wave therapy is a non-invasive, low-risk treatment option that has been proven to be effective in treating chronic musculoskeletal pain. Extracorporeal shock wave therapy is particularly effective for managing conditions such as tendonitis, plantar fasciitis, carpal tunnel syndrome and heel spurs.

The ultrasound therapy segment captured significant share of the global electrotherapy system market in 2023. Ultrasound therapy is a form of electrotherapy used to treat a variety of musculoskeletal conditions, including strains, sprains, tendonitis, bursitis, and plantar fasciitis.

Magnetic field therapy segment is likely to grow with a CAGR of around 6.5% during the period 2024 – 2030. Magnetic field therapy works by placing magnets near the affected area in order to produce a magnetic field which helps to naturally stimulate healing of soft tissues and reduce inflammation.

By Application: Global Electrotherapy System Market – Key Takeaways

Based on application, the pain management segment dominated the global electrotherapy system market in 2023. Pain management via electrotherapy systems is a non-invasive and drug-free approach to tackling and managing both acute and chronic pain. The electrotherapy system helps to reduce both the intensity and duration of pain while also improving the overall quality of life of the patient.

The neuromuscular dysfunction application captured significant share of the global electrotherapy system market. Neuromuscular dysfunction refers to any condition in which there is a malfunction in the interaction between the nervous system and muscles. Electrotherapy systems help by reducing spasms and muscular pain, improving strength and flexibility, and ultimately restoring balance and harmony in the body.

It is projected that the musculoskeletal disorder application will grow with a CAGR of over 6.6% during the period 2024 – 2030. According to the World Health Organization, around 1.71 billion individuals globally are affected by

musculoskeletal conditions.

Chronic wound healing is an advanced method of care that utilizes electrotherapy systems to facilitate healing of chronic wounds. This system helps to improve the local microcirculation, promote re-epithelialization, accelerate the natural regeneration of cells and speed up healing process to promote faster wound closure.

By End User: Global Electrotherapy System Market – Key Takeaways

Based on end-user, the electrotherapy system market is dominated by hospitals & clinics. The preference for hospital & clinics-based care in the treatment of chronic disorders, coupled with the availability of specialized units such as orthopedics department, neurology department, and prosthetics department within these institutions, significantly impacts the demand for electrotherapy system in these settings.

It is predicted that the rehabilitation centers will capture nearly a quarter share of the total electrotherapy system market. Rehabilitation centers provide a convenient environment that is less stressful than what many hospitals can offer.

The long term centers based electrotherapy system market is driven by increasing ageing population, rising prevalence of chronic disorders, and growing government support of long-term care centers for elderly.

By Region: Global Electrotherapy System Market – Key Takeaways

North America dominated the global electrotherapy system market in 2023 and is anticipated to lead the market over the forecast period. This dominance can be attributed to various factors such as the robust healthcare infrastructure, presence of key industry players, increasing incidence of chronic diseases, technological advancements, and the growing geriatric population among others.

Europe held second highest share of the global electrotherapy system market in 2023, driven by factors such as the growing prevalence of chronic diseases, increasing geriatric population, rising number of trauma cases and sports

injuries, and the introduction of advanced electrotherapy devices.

Asia Pacific is likely to witness fastest growth over the forecast period, owing to increasing prevalence of chronic diseases, rising number of road accidents, growing sports injuries and technological advancements. Additionally, the growing geriatric population, rapidly improving healthcare infrastructure, as well as increased levels of discretionary spending, are variables that are driving the market growth.

Middle East and Africa and South America are competing closely with each other to grab maximum share of the electrotherapy system market.

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