

Global Neurosurgical Products Market : Drivers, Opportunities, Trends, and Forecasts: 2017-2023

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Abstracts

Global Neurosurgical Devices Market: Drivers, Opportunities, Trends, and Forecasts: 2017–2023

Overview: Neurosurgery is a complex medical specialty concerned with individuals suffering from neuro-related diseases and disorders. The nervous system is prone to several diseases that affect brain, spine, peripheral nerves, and spinal cord. The symptoms such as muscle weakness, seizures, perception, partial or complete analysis, cognition or emotional state, loss of bowel, and bladder control are due to the various neurological problems. Neurosurgery is the most advanced and modernized method for diagnosis and treatment, which includes computed tomography, magnetic resonance imaging (MRI), computer assisted imaging, stereotactic radiosurgery, and magnetoencephalography. Some of the common neurosurgeries include craniotomy, microsurgery, oncological neurosurgery, neuro-endoscopy (endoscopic endonasal surgery), and stereotactic neurosurgery. There is a wide availability of neurosurgical devices such as neurostimulators, flow diverters, CSF shunts, neuroendoscopes, access devices, and support devices that are used in performing neurosurgeries.

There are about 1 billion individuals, which is nearly 13.46% of the global population, suffering from neurological disorders. Some of the most prevalent neurological disorders are strokes, multiple sclerosis, epilepsy, brain injuries, Alzheimer and Parkinson diseases, and neuro-infections. Neurological disorders cause more than 10% of deaths worldwide. Cerebral disorders are among the most common neurological disorder and are most commonly found in women. The change in lifestyles and stress have resulted in the development of a range of disorders like mood and anxiety disorders. According to the estimates by WHO, more than 350 million people are suffering from depression globally. According to Brain Aneurysm Foundation, there are

about 50 million brain aneurysm-related deaths every year, out of which half of the deaths occur in individuals who are aged below 50 years.

The factors such as increased prevalence of neurological disorders, increasing awareness about new technologies, presence of large pool of patients in emerging markets, and advent of new innovative neurosurgical devices such as flow diversion devices, neuroendovascular stents, liquid embolic, clot retrieval, and balloon catheters are expected to drive the market growth during the forecast period. The market is expected to witness a substantial growth due to the emergence of neuro-interventional technology that has eventually fueled the innovation of many neurosurgical devices with the involvement of minimally invasive technique. The markets in India, Brazil, and China are expected to grow at a rapid pace during the forecast period mainly due to the presence of patients affected with various neurosurgical disorders.

Neurosurgical devices continue to demonstrate substantial improvements in patient outcomes by delivering high-quality and life-sustaining treatment. This factor provides huge potential for market growth in both developed and developing countries with a wide range of opportunities. Vendors are investing hugely in R&D activities in the development of new products to gain major market share globally.

Market Analysis: The “Global Neurosurgical Devices Market” is estimated to witness a CAGR of 10.5% during the forecast period 2017–2023. The Neurosurgical Devices market is analyzed based on three segments – product type, end-users, and regions.

Product Analysis: The “Global Neurosurgical Devices Market” segments include Neurostimulation Devices, Neurointerventional Devices, CSF Management Devices, Neuro Surgical Navigation Systems, and Other Neurosurgical Devices. Neurostimulation Devices is dominating with the presence of advanced neurostimulation devices and availability of clinical data regarding the safety & efficacy of the devices. This enables surgeons to adopt methods for the treatment of neurological disorders. Therefore, opportunities for growth in the emerging countries of LATAM and APAC remain vast. Increasing adoption of MI surgeries in treating neurological disorders, particularly in elderly and the growing availability of devices contribute to the growth of the market.

Regional Analysis: The regions covered in the report are the Americas, EMEA, and Asia Pacific (APAC). The Americas is set to be the leading region for the neurosurgical devices market growth followed by EMEA. There has been a significant increase in the number of individuals undergoing treatment for various neurosurgical procedures in the

US. For instance, according to the American Academy of Neurology, neurological disorders accounted for 7% of all global diseases in 2014.

Europe accounted for the second largest market with chronic pain being one of the major complications with rising burden of cerebral disorders cases. In 2015, the public spending on healthcare in Europe amounted to 18% of the overall government expenditure. The expenditure on chronic pain care with neurostimulation devices is directly reimbursed to hospitals within the NHS. Clinical evidence of neurosurgical devices, when compared to other treatment such as drug therapy, is expected to increase during the forecast period.

The APAC neurosurgical devices market revenue is expected to reach \$2.4 billion by 2023, growing at a CAGR of 13% during the forecast period 2016–2023. The factors such as high prevalence of neurological diseases, presence of a large pool of patients, increase in disposable income, and rise in awareness about treatment for complex neurosurgeries are owing to a substantial growth in the market. Also, the increase in government spending in healthcare, infrastructure, research centers, and the establishment of manufacturing facilities by major vendors are influencing high growth in the market.

Key Players: Boston Scientific Corp., DePuy Synthes, Inc., Integra LifeSciences Holdings Corp., Medtronic PLC, Stryker Corp., and other predominate & niche players.

Competitive Analysis: At present, the market is dominated by Neurostimulation Devices having the maximum number of procedures and sales of neurostimulators in the market. Vendors are focusing on investing a huge amount in R&D activities to develop new innovative products in the market with newer application to offer novel devices. Most of the vendors in the market are focused on expanding their business by mergers & acquisitions, through partnerships, and trade shows. Big players such as Boston Scientific Corp., DePuy Synthes, Inc., Integra LifeSciences Holdings Corp., Medtronic PLC, and Stryker Corp. along with the collaboration with other universities and neurological research centers for clinical trials of neurology diseases are coming up with new neurosurgical devices in the market, which are expected to grow tremendously during the forecast period. Significant investments in R&D and increasing awareness about complex neurosurgical procedures in the market are expected to boost the market growth.

Benefits: The report provides complete details about the usage and adoption rate of neurosurgical devices in various neurology diseases and regions. With that, key

stakeholders can know about the major trends, drivers, investments, vertical player's initiatives, government initiatives towards the neurosurgical devices adoption in the upcoming years along with the details of commercial neurosurgical devices available in the market. Moreover, the report provides details about the major challenges that are going to impact on the market growth. Additionally, the report gives the complete details about the key business opportunities to key stakeholders to expand their business and capture the revenue in the specific verticals to analyze before investing or expanding the business in this market.

Key Stakeholders:

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