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Global Cerebrospinal Fluid (CSF) Management Market - Forecasts from 2020 to 2025

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Abstracts

The global cerebrospinal fluid (CSF) management market is estimated to grow at a CAGR of 4.27% from a market value of USD748.406 million in 2019 to achieve a market value of USD961.819 million by the end of 2025. Cerebrospinal fluid (CSF) management makes use of devices like shunts and drainage systems for the maintenance of the CFS flow and provides assistance in draining excess CSF fluid from brain. Cerebrospinal fluid is an ultrafiltrate of plasma that is present within the ventricles of brain, in addition to the subarachnoid spaces of the cranium and spine. Nourishment, waste removal, and providing protection to brain are the vital functions of the cerebrospinal fluid. Certain medical conditions such as hydrocephalus, and CSF leak are contributing to creating a demand for the development of techniques involved in the CSF management, further promoting the market demand during the forecast period. The presence of companies offering products for CSF management is further providing strong growth prospects for the market to proliferate during the course of the forecast period. The growing global geriatric population is providing growth opportunities for market growth during the forecast period.

Geographically, North America is estimated to hold a significant market share in the global cerebrospinal fluid management market. On the other hand, the Asia Pacific region is estimated to grow at a high growth rate during the forecast period.

COVID-19 impact on the cerebrospinal fluid (CSF) management market: It has been noticed that with the onset of the novel coronavirus pandemic, the hospitals and many other healthcare organizations are dedicated to the treatment of patients suffering from this deadly disease. This has resulted in the shortage of essential medical supplies and efforts are being made towards the utilization of medical supplies by the healthcare professionals only. However, inspite of the difficult situation where the maximum

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healthcare resources are diverted to the treatment of the covid-19 affected individuals, including hospital beds and other treatment rooms, efforts are being made to pay attention to life-threatening emergencies like hydrocephalus, hence, the market growth is projected to grow at a steady pace amid the novel coronavirus pandemic scenario.

The growing incidence of hydrocephalus is propagating the market growth during the forecast period.

It was estimated in recent years that the incidence of congenital hydrocephalus was reported to be highest in the African region and in the Latin American region. While the prevalence was predicted to be lowest in the United States and Canada. The incidence was reported to be highest among the low-income and middle-income countries in comparison to the high-income countries. It was further predicted that every year the novel incidences of hydrocephalus will develop across the world. The greatest disease burden is likely to develop in the regions of Africa, Latin America, and Southeast Asia. Hence, these regions offer significant market growth opportunities during the course of the forecast period. Factors such as high crude birth rate, the presence of individuals with a greater proportion of postinfectious etiology, and the higher incidence of neural tube defect (NTD) is contributing to the incidence of the disease in these regions in comparison to the developed nations. However, with early technology adoption, the market growth in the high-income countries is predicted to continue during the forecast period. This is mainly due to the fact that there is a presence of advanced medical facilities and the major companies with innovative product portfolio are based in these regions along with a substantial amount of geriatric population suffering from hydrocephalus condition.

Hydrocephalus is medical condition that involve the buildup of fluid in the ventricles deep inside the brain. This excessive fluid buildup increases the ventricles' size and puts pressure on the brain. The excessive fluid buildup can damage brain tissues and cause a range of brain function impairments.

The disease can occur at any age, but is more frequently observed in infants and adults, 60 years of age and above. Many therapies including CSF management are developed for the management of symptoms and functional impairments that occur as a result of hydrocephalus.

Hence, with the growing incidence of pediatric hydrocephalus and growing geriatric population at the international level, the market is projected to surge at a significant

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pace over the forecast period.

The presence of companies offering innovative products that aid in the cerebrospinal fluid management is providing an opportunity for the market to grow during the forecast period.

For example, Medtronic offers minimally invasive solutions for hydrocephalus shunting. The product portfolio ranges from adjustable pressure valves, and antibiotic-impregnated catheters to neuro navigation systems that contribute to assisting in guiding placement.

Shunting is the most common therapy utilized in CSF management for individuals suffering from hydrocephalus condition. This involves the implantation of two catheters and flow control valve system for draining excessive agglomeration of cerebrospinal fluid from brain's cavities or the lumbar subarachnoid space to the other part of the body where it can be easily absorbed.

For this, the company's adjustable valves, known as Strata®valves is highly useful in avoiding the cost and shunt revision surgery trauma.

The company's Ares™Antibiotic Impregnated Catheters help in reducing bacterial colonization and are capable of working with any Medtronic shunt system. As catheters are important in managing hydrocephalus, there is a risk of patients contracting shunt infections, hence, this product is highly capable in avoiding infection-like conditions. Furthermore, with neuronavigation facilitating the minimally invasive ventricular access and providing required shunt placement, the company offers StealthStation® neuronavigation systems that work either in combination with optical or AxiEM™ electromagnetic tracking devices in order to provide flexible options as per the surgeon's needs. The AxiEM System help in tip tracking of flexible surgical instruments like stylets, endoscopes, and catheters. It is available in pinned and pinless procedure options. The pinless image-guided shunt placement offers the following benefits that include neuronavigation without the need for attaching the patient in head-holder, it helps in providing better surgical navigation for ventriculostomy and other ventricular access or burr hole procedures. Furthermore, the device eliminates the need for any additional incisions to be made in the case of utilization in combination with a non-invasive, adhesive patient tracker.

Segmentation:

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By Shunt Type

Ventriculo-peritoneal (VP) shunt

Ventriculo-atrial (VA) shunt

Lumbo-peritoneal (LP) shunt

Ventriculo-pleural (VPL) shunt

By Shunt Valve Type

Fixed

Adjustable

By Patient Population

Pediatric

Adult

Geriatric

By Geography

North America

USA

Canada

Mexico

South America

Brazil

Argentina

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Others

Europe

UK

Germany

France

Others

Middle East and Africa

UAE

Israel

Saudi Arabia

Others

Asia Pacific

Japan

China

India

Australia

Others

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10.4. Spiegelberg GmbH & Co. KG
10.5. SOPHYSA
10.6. Natus Medical Incorporated
10.7. M?ller Medical
*The list is not exhaustive

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