

Neuromodulation Market by Type (Internal (Spinal Cord Stimulation, Deep Brain Stimulation), External (Transcranial Magnetic Stimulation), Application (Tremor, Epilepsy, Parkinson's Disease, Depression, Gastroparesis), and Region - Global Forecast to 2028

<https://marketpublishers.com/r/ND9702A25D8EN.html>

Date: February 2024

Pages: 204

Price: US\$ 4,950.00 (Single User License)

ID: ND9702A25D8EN

Abstracts

The global neuromodulation market is valued at an estimated USD 6.2 billion in 2023 and is projected to reach USD 11.0 billion by 2028, at a CAGR of 12.0% during the forecast period. Market growth is driven by factors such as prevalence of neurological disorders and nerve injuries, increasing focus on development of advanced neuromodulation and neurostimulation technologies, growing geriatric population and subsequent increase in prevalence of neurological disorders, government support for research on neurological disorders, availability of reimbursement of neuromodulation devices, collaborations among device manufacturers, healthcare providers, and research institutions to develop neuromodulation devices.

“The internal neuromodulation dominated the neuromodulation market, by type.”

Based on type, global neuromodulation market is categorized into internal and external neuromodulation on type. In 2022, internal neuromodulation contributed largest of neuromodulation market. Market growth is largely driven by the long term associated with cost saving, minimally invasive nature, reduced physical impact and improved quality of life.

“Deep Brain Stimulation segment to grow at a considerable rate among internal neuromodulation type during the forecast period.”

The neuromodulation market is segmented into into deep brain stimulation, spinal cord

stimulation, vagus nerve stimulation, sacral nerve stimulation, and gastric electrical stimulation on type. The increasing incidences of targeted diseases such as Parkinson's disease & depression and companies are focusing product launches, approvals in this segment. These driving factors are the boost market growth.

“Asia Pacific: The fastest-growing region in the neuromodulation market.”

The global neuromodulation market is segmented into five regions - North America, Europe, the Asia Pacific, Rest of the World. The Asia Pacific region is expected to grow at the highest rate during the forecast period in the neuromodulation market. The high growth in the region is due to the primarily be attributed to the increasing geriatric population, and high disease burden of neurological disorders among senior population.

The break-up of the profile of primary participants in the neuromodulation market:

By Company Type: Tier 1 - 28%, Tier 2 - 42%, and Tier 3 - 30%

By Designation: C-level - 30%, D-level - 34%, and Others - 36%

By Region: North America - 46%, Europe - 25%, Asia Pacific - 18%, and the Rest of the World – 11%

The key players in this market are Medtronic (Ireland), Boston Scientific Corporation (US), Abbott Laboratories (US), LivaNova (UK), NeuroPace (US), Neuronetics (US), Helius Medical Technologies (US), Renishaw (UK), Bioinduction (UK), Axonics (US), Nevro Corporation (US), BlueWind Medical (Israel), Aleva Neurotherapeutics (Switzerland), GiMer Medical (Taiwan), NeuroSigma (US), BioWaveGo USA (US), Synapse Biomedical (US), Theranica Bio-Electronics (Israel), MicroTransponder (US), Soterix Medical (US), Saluda Medical (US), Electrocore, Inc. (US), Magstim (UK), BIOTRONIK (Germany), tVNS Technologies (Germany).

Research Coverage:

This research report categorizes the neuromodulation market by type (internal, external), internal (spinal cord stimulation (SCS), deep brain stimulation (DBS), vagus nerve stimulation (VNS), sacral nerve stimulation (SNS), and gastric electrical stimulation (GES)), application ((spinal cord stimulations (failed back syndrome, chronic pain, ischemia), deep brain stimulation (Parkinson's disease, tremors, depression,

other DBS application), sacral nerve stimulation (urine incontinence, fecal incontinence), vagus nerve stimulation (epilepsy, other epilepsy application), gastric electrical stimulation (gastroparesis, obesity), transcutaneous electrical nerve stimulation (Treatment-resistant Depression and other TENS application), transcranial magnetic stimulation (Migraine, Depression) and region (North America, Europe, Asia Pacific, Rest of the World). The scope of the report covers detailed information regarding the major factors, such as drivers, opportunities, and challenges, influencing the growth of the neuromodulation market. A detailed analysis of the key industry players has been done to provide insights into their business overview, products offered, key strategies, acquisitions, and partnerships. New product launches and approvals, and recent developments associated with the neuromodulation market. This report covers the competitive analysis of upcoming startups in the neuromodulation market ecosystem.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall neuromodulation market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (the rising prevalence of neurological disorders, expanding applications of neuromodulation, and rising awareness of neurodegenerative disorders), opportunities (Widening application scope of neuromodulation, large population and increasing healthcare expenditure in emerging economies), and challenges (stringent regulatory frameworks and time-consuming approval processes, shortage of trained professionals, product recalls) influencing the growth of the neuromodulation market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the neuromodulation market.

Market Development: Comprehensive information about lucrative markets – the report analyses the neuromodulation market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the neuromodulation market

Competitive Assessment: In-depth assessment of market shares, growth strategies and product offerings of leading players like Medtronic (Ireland), Boston Scientific Corporation (US), Abbott Laboratories (US), LivaNova (UK), NeuroPace (US), among others in the neuromodulation market strategies.

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
 - 1.2.1 INCLUSIONS AND EXCLUSIONS
- 1.3 MARKET SCOPE
 - 1.3.1 MARKETS COVERED
 - 1.3.2 YEARS CONSIDERED
 - 1.3.3 CURRENCY CONSIDERED
- 1.4 STAKEHOLDERS
- 1.5 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - FIGURE 1 RESEARCH DESIGN
 - 2.1.1 SECONDARY DATA
 - 2.1.1.1 Secondary sources
 - 2.1.2 PRIMARY DATA
 - 2.1.2.1 Key data from primary sources
 - 2.1.2.2 Key industry insights
 - 2.1.2.3 Breakdown of primary interviews: supply- and demand-side participants
 - FIGURE 2 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION (SUPPLY SIDE)
 - FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS: BY END USER, DESIGNATION, AND REGION (DEMAND SIDE)
- 2.2 MARKET SIZE ESTIMATION
 - 2.2.1 BOTTOM-UP APPROACH
 - FIGURE 4 MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH
 - FIGURE 5 MARKET SIZE ESTIMATION: TOP-DOWN APPROACH
 - FIGURE 6 CAGR PROJECTIONS: SUPPLY-SIDE ANALYSIS
- 2.3 MARKET BREAKDOWN AND DATA TRIANGULATION
 - FIGURE 7 DATA TRIANGULATION
- 2.4 MARKET SHARE ASSESSMENT
- 2.5 ASSUMPTIONS
- 2.6 RISK ASSESSMENT
- 2.7 RESEARCH LIMITATIONS

2.7.1 METHODOLOGY-RELATED LIMITATIONS

2.7.2 SCOPE-RELATED LIMITATIONS

2.8 IMPACT OF RECESSION ON NEUROMODULATION MARKET

3 EXECUTIVE SUMMARY

FIGURE 8 NEUROMODULATION MARKET, BY TYPE, 2023 VS. 2028 (USD MILLION)

FIGURE 9 NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2023 VS. 2028 (USD MILLION)

FIGURE 10 NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2023 VS. 2028 (USD MILLION)

FIGURE 11 NEUROMODULATION MARKET, BY REGION

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN NEUROMODULATION MARKET

FIGURE 12 RISING PREVALENCE OF NEUROLOGICAL DISORDERS TO CREATE LUCRATIVE OPPORTUNITIES FOR MARKET PLAYERS

4.2 NORTH AMERICAN NEUROMODULATION MARKET, BY TYPE AND COUNTRY
FIGURE 13 INTERNAL NEUROMODULATION SEGMENT AND US ACCOUNTED FOR LARGEST SHARES OF NORTH AMERICAN MARKET IN 2022

4.3 NEUROMODULATION MARKET, BY COUNTRY

FIGURE 14 CHINA TO REGISTER HIGHEST CAGR IN NEUROMODULATION MARKET DURING FORECAST PERIOD

4.4 NEUROMODULATION MARKET, BY REGION

FIGURE 15 ASIA PACIFIC TO WITNESS HIGHEST GROWTH DURING FORECAST PERIOD

4.5 NEUROMODULATION MARKET: DEVELOPED VS. DEVELOPING MARKETS

FIGURE 16 DEVELOPING MARKETS TO REGISTER HIGHER GROWTH DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 17 NEUROMODULATION MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, CHALLENGES, AND TRENDS

5.2.1 DRIVERS

5.2.1.1 Rising prevalence of neurological disorders and nerve injuries

5.2.1.2 Increasing focus on development of advanced neuromodulation and neurostimulation technologies

5.2.1.3 Increasing collaborations among device manufacturers, healthcare providers, and research institutions to develop neuromodulation devices

5.2.1.4 Growing geriatric population and subsequent increase in prevalence of neurological disorders

5.2.1.5 Availability of reimbursements for neuromodulation devices

5.2.1.6 Government-led support for research on neurological disorders

5.2.2 RESTRAINTS

5.2.2.1 High cost of neuromodulation procedures

5.2.2.2 Preference for drug therapies over neuromodulation products

5.2.2.3 Adverse effects and complications associated with neuromodulation devices

TABLE 1 POTENTIAL ADVERSE EFFECTS ASSOCIATED WITH DIFFERENT NEUROMODULATION DEVICES

5.2.3 OPPORTUNITIES

5.2.3.1 Large population and increasing healthcare expenditure in emerging economies

5.2.3.2 Widening application scope of neuromodulation

TABLE 2 INDICATIVE LIST OF NEUROMODULATION CLINICAL TRIALS

FIGURE 18 PUBLISHED RESEARCH PAPERS, 2013–2022

5.2.4 CHALLENGES

5.2.4.1 Stringent regulatory framework and time-consuming approval processes for neuromodulation and neurostimulation devices

5.2.4.2 Shortage of trained professionals

5.2.4.3 Product recalls

TABLE 3 MAJOR PRODUCT RECALLS

5.2.5 TRENDS

5.2.5.1 Role of artificial intelligence (AI) in advancing neuromodulation

5.3 VALUE CHAIN ANALYSIS

FIGURE 19 NEUROMODULATION MARKET: VALUE CHAIN ANALYSIS

5.3.1 RESEARCH AND DEVELOPMENT (R&D)

5.3.2 MANUFACTURING AND ASSEMBLY

5.3.3 DISTRIBUTION, MARKETING & SALES, AND POST-SALES SERVICES

5.4 SUPPLY CHAIN ANALYSIS

FIGURE 20 DIRECT DISTRIBUTION—PREFERRED STRATEGY OF PROMINENT COMPANIES

5.5 TECHNOLOGY ANALYSIS

5.6 PORTER'S FIVE FORCES ANALYSIS

TABLE 4 NEUROMODULATION MARKET: PORTER'S FIVE FORCES ANALYSIS**5.6.1 THREAT OF NEW ENTRANTS****5.6.2 INTENSITY OF COMPETITIVE RIVALRY****5.6.3 BARGAINING POWER OF BUYERS****5.6.4 BARGAINING POWER OF SUPPLIERS****5.6.5 THREAT OF SUBSTITUTES****5.7 KEY STAKEHOLDERS AND BUYING CRITERIA****5.7.1 KEY STAKEHOLDERS IN BUYING PROCESS****FIGURE 21 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY END USER****TABLE 5 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS BY END USER****5.7.2 BUYING CRITERIA****FIGURE 22 KEY BUYING CRITERIA BY END USER****5.8 REGULATORY LANDSCAPE****TABLE 6 LIST OF REGULATORY AUTHORITIES GOVERNING NEUROMODULATION****5.8.1 REGULATORY LANDSCAPE, BY REGION****5.8.1.1 North America****5.8.1.1.1 US****TABLE 7 CLASSIFICATION OF MEDICAL DEVICES BY US FDA****5.8.1.2 Europe****5.8.1.3 Asia Pacific****5.8.1.3.1 India****5.8.1.3.2 China****TABLE 8 NMPA MEDICAL DEVICES CLASSIFICATION****5.8.1.4 Japan****TABLE 9 JAPAN: CLASSIFICATION OF MEDICAL DEVICES****5.9 PATENT ANALYSIS****5.10 KEY CONFERENCES AND EVENTS, 2024–2025****TABLE 10 NEUROMODULATION MARKET: LIST OF CONFERENCES AND EVENTS, 2024–2025****5.11 PRICING ANALYSIS****TABLE 11 PRICE RANGE OF NEUROMODULATION DEVICES AND PROCEDURES, 2022****5.12 TRADE ANALYSIS****TABLE 12 IMPORT DATA FOR HS CODE 901890-COMPLIANT PRODUCTS, BY COUNTRY, 2018–2022 (USD MILLION)****TABLE 13 EXPORT DATA FOR HS CODE 901890-COMPLIANT PRODUCTS, BY COUNTRY, 2018–2022 (USD MILLION)**

5.13 ECOSYSTEM MAPPING

FIGURE 23 NEUROMODULATION MARKET: ECOSYSTEM MAPPING

TABLE 14 COMPANIES AND THEIR ROLES IN NEUROMODULATION ECOSYSTEM

FIGURE 24 KEY PLAYERS IN NEUROMODULATION MARKET

5.14 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 25 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

6 NEUROMODULATION MARKET, BY TYPE

6.1 INTRODUCTION

TABLE 15 NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

6.2 INTERNAL NEUROMODULATION

TABLE 16 INTERNAL: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 17 INTERNAL: NEUROMODULATION MARKET, BY REGION, 2021–2028 (USD MILLION)

6.2.1 SPINAL CORD STIMULATION

6.2.1.1 Growing incidence of spinal cord injuries to fuel market growth

TABLE 18 SPINAL CORD STIMULATION DEVICES OFFERED BY MAJOR COMPANIES

TABLE 19 INTERNAL: NEUROMODULATION MARKET FOR SPINAL CORD STIMULATION, BY REGION, 2021–2028 (USD MILLION)

6.2.2 DEEP BRAIN STIMULATION

6.2.2.1 Growing use to control debilitating symptoms caused by neurological disorders to drive market

TABLE 20 DEEP BRAIN STIMULATION DEVICES OFFERED BY MAJOR COMPANIES

TABLE 21 INTERNAL: NEUROMODULATION MARKET FOR DEEP BRAIN STIMULATION, BY REGION, 2021–2028 (USD MILLION)

6.2.3 VAGUS NERVE STIMULATION

6.2.3.1 Rising geriatric population and high incidence of epilepsy to drive market

TABLE 22 VAGUS NERVE STIMULATION DEVICES OFFERED BY MAJOR COMPANIES

TABLE 23 INTERNAL: NEUROMODULATION MARKET FOR VAGUS NERVE STIMULATION, BY REGION, 2021–2028 (USD MILLION)

6.2.4 SACRAL NERVE STIMULATION

6.2.4.1 Widening application scope of sacral nerve stimulation to drive market

TABLE 24 SACRAL NERVE STIMULATION DEVICES OFFERED BY MAJOR COMPANIES

TABLE 25 INTERNAL: NEUROMODULATION MARKET FOR SACRAL NERVE STIMULATION, BY REGION, 2021–2028 (USD MILLION)

6.2.5 GASTRIC ELECTRICAL STIMULATION

6.2.5.1 Growing number of people suffering from severe gastroesophageal reflux disease (GERD) and gastroparesis to fuel market growth

TABLE 26 GASTRIC ELECTRICAL STIMULATION DEVICES OFFERED BY MAJOR COMPANIES

TABLE 27 INTERNAL: NEUROMODULATION MARKET FOR GASTRIC ELECTRICAL STIMULATION, BY REGION, 2021–2028 (USD MILLION)

6.3 EXTERNAL NEUROMODULATION

TABLE 28 EXTERNAL NEUROMODULATION: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 29 EXTERNAL NEUROMODULATION: NEUROMODULATION MARKET, BY REGION, 2021–2028 (USD MILLION)

6.3.1 TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION (TENS)

6.3.1.1 Extensive use in healthcare sector, low cost, and ease of use to fuel market growth

TABLE 30 TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION DEVICES OFFERED BY MAJOR COMPANIES

TABLE 31 EXTERNAL: NEUROMODULATION MARKET FOR TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION, BY REGION, 2021–2028 (USD MILLION)

6.3.2 TRANSCRANIAL MAGNETIC STIMULATION (TMS)

6.3.2.1 Minimal patient discomfort associated with transcranial magnetic stimulation (TMS) to support demand

TABLE 32 TRANSCRANIAL MAGNETIC STIMULATION DEVICE OFFERED BY MAJOR COMPANIES

TABLE 33 EXTERNAL: NEUROMODULATION MARKET FOR TRANSCRANIAL MAGNETIC STIMULATION, BY REGION, 2021–2028 (USD MILLION)

6.3.3 RESPIRATORY ELECTRICAL STIMULATION

6.3.3.1 High treatment efficacy to fuel market growth

TABLE 34 RESPIRATORY ELECTRICAL STIMULATION DEVICE OFFERED BY MAJOR COMPANIES

TABLE 35 EXTERNAL: NEUROMODULATION MARKET FOR RESPIRATORY ELECTRICAL STIMULATION, BY REGION, 2021–2028 (USD MILLION)

7 NEUROMODULATION MARKET, BY APPLICATION

7.1 INTRODUCTION

7.2 NEUROMODULATION MARKET FOR SPINAL CORD STIMULATION, BY

APPLICATION

TABLE 36 NEUROMODULATION MARKET FOR SPINAL CORD STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

7.2.1 CHRONIC PAIN

7.2.1.1 High incidence of chronic pain to support market growth

TABLE 37 SPINAL CORD STIMULATION MARKET FOR CHRONIC PAIN, BY REGION, 2021–2028 (USD MILLION)

7.2.2 FAILED BACK SURGERY SYNDROME (FBSS)

7.2.2.1 Increasing incidence of failed back surgery syndrome (FBSS) with rising number of surgeries annually to drive demand

TABLE 38 SPINAL CORD STIMULATION MARKET FOR FAILED BACK SURGERY SYNDROME, BY REGION, 2021–2028 (USD MILLION)

7.2.3 ISCHEMIA

7.2.3.1 High effectiveness of neuromodulation for ischemia treatment to support market growth

TABLE 39 SPINAL CORD STIMULATION MARKET FOR ISCHEMIA, BY REGION, 2021–2028 (USD MILLION)

7.3 NEUROMODULATION MARKET FOR DEEP BRAIN STIMULATION, BY APPLICATION

TABLE 40 NEUROMODULATION MARKET FOR DEEP BRAIN STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

7.3.1 PARKINSON'S DISEASE

7.3.1.1 Rising incidence of Parkinson's disease and growing R&D for innovation to drive market

TABLE 41 DEEP BRAIN STIMULATION MARKET FOR PARKINSON'S DISEASE, BY REGION, 2021–2028 (USD MILLION)

7.3.2 TREMORS

7.3.2.1 High efficacy of deep brain stimulation (DBS) in treating tremors to boost demand

TABLE 42 DEEP BRAIN STIMULATION MARKET FOR TREMORS, BY REGION, 2021–2028 (USD MILLION)

7.3.3 DEPRESSION

7.3.3.1 Rising research and clinical studies related to depression treatment to drive market

TABLE 43 DEEP BRAIN STIMULATION MARKET FOR DEPRESSION, BY REGION, 2021–2028 (USD MILLION)

7.3.4 OTHER DBS APPLICATIONS

TABLE 44 DEEP BRAIN STIMULATION MARKET FOR OTHER DBS APPLICATIONS, BY REGION, 2021–2028 (USD MILLION)

7.4 NEUROMODULATION MARKET FOR SACRAL NERVE STIMULATION, BY APPLICATION

TABLE 45 NEUROMODULATION MARKET FOR SACRAL NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

7.4.1 URINE INCONTINENCE

7.4.1.1 High incidence of urine incontinence to create growth opportunities

TABLE 46 SACRAL NERVE STIMULATION MARKET FOR URINE INCONTINENCE, BY REGION, 2021–2028 (USD MILLION)

7.4.2 FECAL INCONTINENCE

7.4.2.1 Reduced symptom recurrence with use of SNS in fecal incontinence treatment to drive demand

TABLE 47 SACRAL NERVE STIMULATION MARKET FOR FECAL INCONTINENCE, BY REGION, 2021–2028 (USD MILLION)

7.5 NEUROMODULATION MARKET FOR VAGUS NERVE STIMULATION (VNS), BY APPLICATION

TABLE 48 NEUROMODULATION MARKET FOR VAGUS NERVE SIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

7.5.1 EPILEPSY

7.5.1.1 Advantages associated with VNS in epilepsy treatment to propel market growth

TABLE 49 VAGUS NERVE STIMULATION MARKET FOR EPILEPSY, BY REGION, 2021–2028 (USD MILLION)

7.5.2 OTHER VNS APPLICATIONS

TABLE 50 VAGUS NERVE STIMULATION MARKET FOR OTHER VNS APPLICATIONS, BY REGION, 2021–2028 (USD MILLION)

7.6 NEUROMODULATION MARKET FOR GASTRIC ELECTRICAL STIMULATION, BY APPLICATION

TABLE 51 NEUROMODULATION MARKET FOR GASTRIC ELECTRICAL STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

7.6.1 GASTROPARESIS

7.6.1.1 Reduced hospitalization time for patients affected by gastroparesis by GES treatment to drive market

TABLE 52 GASTRIC ELECTRICAL STIMULATION MARKET FOR GASTROPARESIS, BY REGION, 2021–2028 (USD MILLION)

7.6.2 OBESITY

7.6.2.1 High prevalence of obesity and risks associated with gastric bypass to fuel demand

TABLE 53 GASTRIC ELECTRICAL STIMULATION MARKET FOR OBESITY, BY REGION, 2021–2028 (USD MILLION)

7.7 NEUROMODULATION MARKET FOR TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION, BY APPLICATION

TABLE 54 NEUROMODULATION MARKET FOR TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

7.7.1 TREATMENT-RESISTANT DEPRESSION

7.7.1.1 Increasing prevalence of depression to boost market growth

TABLE 55 TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION MARKET FOR TREATMENT-RESISTANT DEPRESSION, BY REGION, 2021–2028 (USD MILLION)

7.7.2 OTHER TENS APPLICATIONS

TABLE 56 TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION MARKET FOR OTHER TENS APPLICATIONS, BY REGION, 2021–2028 (USD MILLION)

7.8 NEUROMODULATION MARKET FOR TRANSCRANIAL MAGNETIC STIMULATION, BY APPLICATION

TABLE 57 NEUROMODULATION MARKET FOR TRANSCRANIAL MAGNETIC STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 58 TRANSCRANIAL MAGNETIC STIMULATION MARKET FOR DEPRESSION, BY REGION, 2021–2028 (USD MILLION)

7.8.1 DEPRESSION

7.8.1.1 High effectiveness of TMS and increased acceptance among patients to drive market

TABLE 59 TRANSCRANIAL MAGNETIC STIMULATION MARKET FOR DEPRESSION, BY REGION, 2021–2028 (USD MILLION)

7.8.2 MIGRAINE

7.8.2.1 High prevalence of migraine to support market growth

TABLE 60 TRANSCRANIAL MAGNETIC STIMULATION MARKET FOR MIGRAINE, BY REGION, 2021–2028 (USD MILLION)

7.9 NEUROMODULATION MARKET FOR RESPIRATORY ELECTRICAL STIMULATION, BY APPLICATION

7.9.1 SPINAL CORD INJURY

7.9.1.1 Rising incidence of spinal cord injuries to fuel demand

TABLE 61 RESPIRATORY ELECTRICAL STIMULATION MARKET FOR SPINAL CORD INJURY, BY REGION, 2021–2028 (USD MILLION)

8 NEUROMODULATION MARKET, BY REGION

8.1 INTRODUCTION

TABLE 62 NEUROMODULATION MARKET, BY REGION, 2021–2028 (USD MILLION)

8.2 NORTH AMERICA

FIGURE 26 NORTH AMERICA: NEUROMODULATION MARKET SNAPSHOT

TABLE 63 NORTH AMERICA: NEUROMODULATION MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 64 NORTH AMERICA: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 65 NORTH AMERICA: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 66 NORTH AMERICA: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 67 NORTH AMERICA: NEUROMODULATION MARKET FOR SPINAL CORD STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 68 NORTH AMERICA: NEUROMODULATION MARKET FOR DEEP BRAIN STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 69 NORTH AMERICA: NEUROMODULATION MARKET FOR SACRAL NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 70 NORTH AMERICA: NEUROMODULATION MARKET FOR VAGUS NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 71 NORTH AMERICA: NEUROMODULATION MARKET FOR GASTRIC ELECTRICAL STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 72 NORTH AMERICA: NEUROMODULATION MARKET FOR TRANSCRANIAL MAGNETIC STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 73 NORTH AMERICA: NEUROMODULATION MARKET FOR TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

8.2.1 US

8.2.1.1 Large presence of prominent players to drive market

FIGURE 27 PROJECTED NUMBER OF PEOPLE WITH ALZHEIMER'S DEMENTIA IN US, 2020–2060 (MILLION)

TABLE 74 US FDA-APPROVED PRODUCTS, 2019–2022

TABLE 75 US: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 76 US: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 77 US: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.2.2 CANADA

8.2.2.1 Rising healthcare expenditure and increasing prevalence of chronic diseases to drive demand

TABLE 78 NEUROLOGICAL CONDITIONS PREVALENT IN CANADA, 2016–2031

TABLE 79 CANADA: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD

MILLION)

TABLE 80 CANADA: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 81 CANADA: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.2.3 NORTH AMERICAN NEUROMODULATION MARKET: RECESSION IMPACT

8.3 EUROPE

TABLE 82 PREVALENCE OF DEMENTIA, BY COUNTRY, 2018 & 2050

TABLE 83 EUROPE: NEUROMODULATION MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 84 EUROPE: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 85 EUROPE: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 86 EUROPE: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 87 EUROPE: NEUROMODULATION MARKET FOR SPINAL CORD STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 88 EUROPE: NEUROMODULATION MARKET FOR DEEP BRAIN STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 89 EUROPE: NEUROMODULATION MARKET FOR SACRAL NERVE STIMULATION MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 90 EUROPE: NEUROMODULATION MARKET FOR VAGUS NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 91 EUROPE: NEUROMODULATION MARKET FOR GASTRIC ELECTRICAL STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 92 EUROPE: NEUROMODULATION MARKET FOR TRANSCRANIAL MAGNETIC STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 93 EUROPE: NEUROMODULATION MARKET FOR TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

8.3.1 GERMANY

8.3.1.1 Increasing healthcare expenditure and presence of favorable reimbursement policies to drive market

TABLE 94 GERMANY: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 95 GERMANY: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 96 GERMANY: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.3.2 UK

8.3.2.1 Rising healthcare expenditure and high public- and private-sector investments to fuel market growth

TABLE 97 UK: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 98 UK: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 99 UK: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.3.3 FRANCE

8.3.3.1 Availability of insurance and favorable healthcare reforms to drive market

TABLE 100 FRANCE: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 101 FRANCE: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 102 FRANCE: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.3.4 ITALY

8.3.4.1 Easy access to healthcare services to create lucrative opportunities for market

TABLE 103 ITALY: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 104 ITALY: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 105 ITALY: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.3.5 SPAIN

8.3.5.1 Growing government-led initiatives related to healthcare to support market growth

TABLE 106 SPAIN: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 107 SPAIN: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 108 SPAIN: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.3.6 REST OF EUROPE

TABLE 109 REST OF EUROPE: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 110 REST OF EUROPE: NEUROMODULATION MARKET FOR INTERNAL,

BY TYPE, 2021–2028 (USD MILLION)

TABLE 111 REST OF EUROPE: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.3.7 EUROPEAN NEUROMODULATION MARKET: RECESSION IMPACT

8.4 ASIA PACIFIC

FIGURE 28 ASIA PACIFIC: NEUROMODULATION MARKET SNAPSHOT

TABLE 112 ASIA PACIFIC: NEUROMODULATION MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 113 ASIA PACIFIC: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 114 ASIA PACIFIC: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 115 ASIA PACIFIC: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 116 ASIA PACIFIC: NEUROMODULATION MARKET FOR SPINAL CORD STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 117 ASIA PACIFIC: NEUROMODULATION MARKET FOR DEEP BRAIN STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 118 ASIA PACIFIC: NEUROMODULATION MARKET FOR SACRAL NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 119 ASIA PACIFIC: NEUROMODULATION MARKET FOR VAGUS NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 120 ASIA PACIFIC: NEUROMODULATION MARKET FOR GASTRIC ELECTRICAL STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 121 ASIA PACIFIC: NEUROMODULATION MARKET FOR TRANSCRANIAL MAGNETIC STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 122 ASIA PACIFIC: NEUROMODULATION MARKET FOR TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

8.4.1 JAPAN

8.4.1.1 Increasing prevalence of neurological disorders to drive demand

TABLE 123 JAPAN: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 124 JAPAN: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 125 JAPAN: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.4.2 CHINA

8.4.2.1 Growing geriatric population to fuel demand

TABLE 126 CHINA: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 127 CHINA: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 128 CHINA: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.4.3 INDIA

8.4.3.1 Improvements in healthcare infrastructure to contribute to market growth

TABLE 129 INDIA: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 130 INDIA: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 131 INDIA: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.4.4 REST OF ASIA PACIFIC

TABLE 132 REST OF ASIA PACIFIC: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 133 REST OF ASIA PACIFIC: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 134 REST OF ASIA PACIFIC: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.4.5 ASIA PACIFIC NEUROMODULATION MARKET: RECESSION IMPACT

8.5 ROW

TABLE 135 ROW: NEUROMODULATION MARKET, BY COUNTRY/REGION, 2021–2028 (USD MILLION)

TABLE 136 ROW: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 137 ROW: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 138 ROW: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 139 ROW: NEUROMODULATION MARKET FOR SPINAL CORD STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 140 ROW: NEUROMODULATION MARKET FOR DEEP BRAIN STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 141 ROW: NEUROMODULATION MARKET FOR SACRAL NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 142 ROW: NEUROMODULATION MARKET FOR VAGUS NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 143 ROW: NEUROMODULATION MARKET FOR GASTRIC ELECTRICAL STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 144 ROW: NEUROMODULATION MARKET FOR TRANSCRANIAL MAGNETIC STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 145 ROW: NEUROMODULATION MARKET FOR TRANSCUTANEOUS ELECTRICAL NERVE STIMULATION, BY APPLICATION, 2021–2028 (USD MILLION)

8.5.1 LATIN AMERICA

8.5.1.1 Increasing cases of depressive and post-traumatic stress disorders to drive demand

TABLE 146 LATIN AMERICA: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 147 LATIN AMERICA: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 148 LATIN AMERICA: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.5.2 MIDDLE EAST & AFRICA

8.5.2.1 Improvements in healthcare infrastructure and growing awareness regarding neuromodulation to drive market

TABLE 149 MIDDLE EAST & AFRICA: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 150 MIDDLE EAST & AFRICA: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 151 MIDDLE EAST & AFRICA: NEUROMODULATION MARKET FOR EXTERNAL, BY TYPE, 2021–2028 (USD MILLION)

8.5.3 GCC COUNTRIES

TABLE 152 GCC COUNTRIES: NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 153 GCC COUNTRIES: NEUROMODULATION MARKET FOR INTERNAL, BY TYPE, 2021–2028 (USD MILLION)

TABLE 154 GCC COUNTRIES: EXTERNAL NEUROMODULATION MARKET, BY TYPE, 2021–2028 (USD MILLION)

8.5.4 ROW NEUROMODULATION MARKET: RECESSION IMPACT

9 COMPETITIVE LANDSCAPE

9.1 OVERVIEW

9.2 STRATEGIES ADOPTED BY KEY PLAYERS

TABLE 155 NEUROMODULATION MARKET: OVERVIEW OF STRATEGIES ADOPTED BY KEY PLAYERS

9.3 REVENUE SHARE ANALYSIS, 2020–2022

FIGURE 29 NEUROMODULATION MARKET: REVENUE ANALYSIS OF FIVE KEY PLAYERS, 2020–2022

9.4 MARKET SHARE ANALYSIS, 2022

TABLE 156 NEUROMODULATION MARKET: DEGREE OF COMPETITION

9.5 COMPANY EVALUATION MATRIX, 2022

9.5.1 STARS

9.5.2 EMERGING LEADERS

9.5.3 PERVASIVE PLAYERS

9.5.4 PARTICIPANTS

FIGURE 30 NEUROMODULATION MARKET: COMPANY EVALUATION MATRIX, 2022

9.5.5 COMPANY FOOTPRINT

TABLE 157 OVERALL COMPANY FOOTPRINT

TABLE 158 COMPANY REGION FOOTPRINT

TABLE 159 COMPANY TYPE FOOTPRINT

9.6 START-UPS/SMALL AND MEDIUM-SIZED ENTERPRISES (SMES) EVALUATION MATRIX, 2022

9.6.1 PROGRESSIVE COMPANIES

9.6.2 STARTING BLOCKS

9.6.3 RESPONSIVE COMPANIES

9.6.4 DYNAMIC COMPANIES

FIGURE 31 NEUROMODULATION MARKET: START-UPS/SMES EVALUATION MATRIX, 2022

9.6.5 COMPETITIVE BENCHMARKING

TABLE 160 NEUROMODULATION MARKET: LIST OF KEY START-UPS/SMES

9.7 COMPETITIVE SCENARIOS AND TRENDS

9.7.1 PRODUCT LAUNCHES & APPROVALS

TABLE 161 NEUROMODULATION MARKET: PRODUCT LAUNCHES & APPROVALS, 2020–2023

9.7.2 DEALS

TABLE 162 NEUROMODULATION MARKET: DEALS, 2020–2023

10 COMPANY PROFILES

(Business overview, Products/Services/Solutions offered, Recent Developments, MNM view)*

10.1 KEY PLAYERS

10.1.1 MEDTRONIC PLC

TABLE 163 MEDTRONIC PLC: COMPANY OVERVIEW

FIGURE 32 MEDTRONIC PLC: COMPANY SNAPSHOT

TABLE 164 MEDTRONIC PLC: PRODUCT APPROVALS

TABLE 165 MEDTRONIC PLC: DEALS

10.1.2 BOSTON SCIENTIFIC CORPORATION

TABLE 166 BOSTON SCIENTIFIC CORPORATION: COMPANY OVERVIEW

FIGURE 33 BOSTON SCIENTIFIC CORPORATION: COMPANY SNAPSHOT

TABLE 167 BOSTON SCIENTIFIC CORPORATION: PRODUCT LAUNCHES AND APPROVALS

TABLE 168 BOSTON SCIENTIFIC CORPORATION: DEALS

10.1.3 ABBOTT LABORATORIES

TABLE 169 ABBOTT LABORATORIES: COMPANY OVERVIEW

FIGURE 34 ABBOTT LABORATORIES: COMPANY SNAPSHOT

TABLE 170 ABBOTT LABORATORIES: PRODUCT LAUNCHES AND APPROVALS

10.1.4 LIVANOVA PLC

TABLE 171 LIVANOVA PLC: COMPANY OVERVIEW

FIGURE 35 LIVANOVA PLC: COMPANY SNAPSHOT

TABLE 172 LIVANOVA PLC: PRODUCT APPROVALS

TABLE 173 LIVANOVA PLC: DEALS

10.1.5 NEVRO CORPORATION

TABLE 174 NEVRO CORPORATION: COMPANY OVERVIEW

FIGURE 36 NEVRO CORPORATION: COMPANY SNAPSHOT

TABLE 175 NEVRO CORPORATION: PRODUCT APPROVALS

TABLE 176 NEVRO CORPORATION: DEALS

10.1.6 NEUROSIGMA, INC.

TABLE 177 NEUROSIGMA, INC.: COMPANY OVERVIEW

TABLE 178 NEUROSIGMA, INC.: PRODUCT LAUNCHES & APPROVALS

TABLE 179 NEUROSIGMA, INC.: DEALS

TABLE 180 NEUROSIGMA, INC.: OTHERS

10.1.7 NEUROPACE, INC.

TABLE 181 NEUROPACE, INC.: COMPANY OVERVIEW

FIGURE 37 NEUROPACE, INC.: COMPANY SNAPSHOT

TABLE 182 NEUROPACE, INC.: PRODUCT LAUNCHES & APPROVALS

TABLE 183 NEUROPACE, INC.: OTHERS

10.1.8 SOTERIX MEDICAL INC.

TABLE 184 SOTERIX MEDICAL INC.: COMPANY OVERVIEW

TABLE 185 NEUROPACE, INC.: OTHERS

10.1.9 SYNAPSE BIOMEDICAL INC.

TABLE 186 SYNAPSE BIOMEDICAL INC.: COMPANY OVERVIEW

- 10.1.10 ALEVA NEUROTHERAPEUTICS SA
 - TABLE 187 ALEVA NEUROTHERAPEUTICS SA: COMPANY OVERVIEW
 - TABLE 188 ALEVA NEUROTHERAPEUTICS SA: PRODUCT APPROVALS
- 10.1.11 THERANICA BIO-ELECTRONICS LTD.
 - TABLE 189 THERANICA BIO-ELECTRONICS LTD.: COMPANY OVERVIEW
 - TABLE 190 THERANICA BIO-ELECTRONICS LTD.: PRODUCT APPROVALS
- 10.1.12 NEURONETICS
 - TABLE 191 NEURONETICS: COMPANY OVERVIEW
 - FIGURE 38 NEURONETICS: COMPANY SNAPSHOT
- 10.1.13 AXONICS
 - TABLE 192 AXONICS: COMPANY OVERVIEW
 - FIGURE 39 AXONICS: COMPANY SNAPSHOT
 - TABLE 193 AXONICS: PRODUCT APPROVALS
 - TABLE 194 AXONICS: DEALS
- 10.1.14 BIOINDUCTION
 - TABLE 195 BIOINDUCTION: COMPANY OVERVIEW
- 10.2 OTHER PLAYERS
 - 10.2.1 GIMER MEDICAL
 - 10.2.2 NALU MEDICAL INC.
 - 10.2.3 HELIUS MEDICAL TECHNOLOGIES
 - 10.2.4 MICROTRANSPONDER
 - 10.2.5 MAGSTIM
 - 10.2.6 ELECTROCORE, INC.
 - 10.2.7 RENISHAW PLC
 - 10.2.8 TVNS TECHNOLOGIES GMBH
 - 10.2.9 BIOWAVEGO USA
 - 10.2.10 BIOTRONIK
 - 10.2.11 SALUDA MEDICAL PTY LTD.

*Details on Business overview, Products/Services/Solutions offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

11 APPENDIX

- 11.1 DISCUSSION GUIDE
- 11.2 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL
- 11.3 CUSTOMIZATION OPTIONS
- 11.4 RELATED REPORTS
- 11.5 AUTHOR DETAILS

About

The global neuromodulation market is estimated at \$3.65 Billion in 2015, and is projected to reach \$6.20 Billion by 2020, at a CAGR of 11.2% during the forecast period.

The global neuromodulation market is segmented on the basis of technology, application, and region.

Factors such as rising geriatric population, increasing prevalence of neurological diseases, strong product pipeline offered by players, and expanded target applications and new indications are driving the growth of this market. However, factors such as unfavourable reimbursement scenario and lack of trained professionals are hindering its market growth.

Some of the major players in the global Neuromodulation Market are

Medtronic, Inc. (U.S.)

Boston Scientific Corporation (U.S.)

St. Jude Medical, Inc. (U.S.)

Synapse Biomedical, Inc. (U.S.)

Nevro Corporation (U.S.)

Neurosigma, Inc. (U.S.)

Based on technology, the neuromodulation market is segmented into internal neuromodulation and external neuromodulation. Internal neuromodulation is further segmented into spinal cord stimulation (SCS), deep brain stimulation (DBS), vagus nerve stimulation (VNS), sacral nerve stimulation (SNS), and gastric electrical stimulation (GES). External neuromodulation is categorized into transcutaneous

electrical nerve stimulation (TENS), transcranial magnetic stimulation (TMS), and respiratory electrical stimulation (RES).

Based on application, the neuromodulation market is segmented into technology-wise applications, such as spinal cord stimulation (chronic pain, failed back surgery, ischemia); deep brain stimulation (Parkinsons disease, tremor, depression, others); sacral nerve stimulation (urine incontinence, fecal incontinence); vagus nerve stimulation (epilepsy, others); gastric electrical stimulation (gastro paresis, obesity); transcutaneous electrical nerve stimulation (treatment resistant depression, others); and transcranial magnetic stimulation (depression, migraine headaches).

On the basis of region, the market is divided into North America, Europe, Asia-Pacific, and rest of the world (RoW). The rest of the world region comprises Latin America, the Middle East, and Africa. North America is expected to account for the largest share of the neuromodulation market, followed by Europe, Asia-Pacific, and rest of the world (RoW) in 2015.

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