

# **Deep Brain Stimulation Devices Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type**

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## **Abstracts**

### **Deep Brain Stimulation Devices Market Summary**

#### **Introduction**

Deep brain stimulation (DBS) devices are implantable neurostimulation systems that deliver electrical pulses to specific brain regions to manage symptoms of neurological disorders such as Parkinson's disease (PD), epilepsy, essential tremor, and dystonia. Available in single-channel and dual-channel types, they are used in hospitals, neurology clinics, ambulatory surgical centers, and research centers. The market is propelled by the rising global prevalence of neurological conditions, with the World Health Organization estimating 50 million people with epilepsy and over 10 million with Parkinson's disease in 2023, numbers expected to grow with aging populations. DBS offers a minimally invasive, long-term treatment option, improving patient quality of life, which drives demand alongside technological advancements like adaptive stimulation and rechargeable systems.

#### **Market Size and Growth Forecast**

The global deep brain stimulation devices market is projected to reach between USD 890 million and USD 1,180 million in 2025, with a compound annual growth rate (CAGR) of 9.5% to 11.9% through 2030, reflecting disease burden and innovation.

#### **Regional Analysis**

**North America:** The U.S. leads with approximately 100,000 annual DBS surgeries and advanced neurology care, while Canada focuses on innovative treatments.

**Europe:** Germany, France, and the UK dominate, driven by aging populations and strong healthcare systems.

**Asia Pacific:** China and India see rapid growth due to rising neurological disease rates, while Japan emphasizes elderly care solutions.

**Rest of the World:** Brazil expands neurology infrastructure, and the Middle East, notably the UAE, invests in advanced devices.

### Application Analysis

**Hospitals:** Projected growth of 9.0-11.5%, driven by complex DBS implantations. Trends focus on integrating adaptive technologies.

**Neurology Clinics:** Expected growth of 9.5-12.0%, linked to patient follow-ups. Developments emphasize programming efficiency.

**Ambulatory Surgical Centers:** Growth at 9.8-12.5%, tied to outpatient procedures. Advances prioritize minimally invasive techniques.

**Research Centers:** Growth at 9.0-11.0%, driven by clinical trials. Trends focus on next-generation DBS systems.

### Type Analysis

**Single Channel:** Anticipated growth of 9.0-11.5%, valued for simplicity in unilateral stimulation. Trends highlight cost-effectiveness.

**Dual Channel:** Expected growth of 10.0-12.5%, key for bilateral stimulation in advanced cases. Advances focus on precision and adaptability.

### Key Market Players

Key firms include Medtronic, leading in neurostimulation; Boston Scientific Corporation, advancing directional stimulation; Abbott, offering rechargeable solutions; Aleva

Neurotherapeutics, innovating in DBS technology; Nexstim, enhancing neurological tools; LivaNova, supporting neuromodulation; and NeuroPace, focusing on responsive stimulation. These players drive market growth through innovation.

### Porter's Five Forces Analysis

**Threat of New Entrants:** Moderate, due to high R&D costs and regulatory barriers, though niche innovators can enter.

**Threat of Substitutes:** Moderate, with medications and ablation competing, though DBS offers unique long-term benefits.

**Bargaining Power of Buyers:** Moderate, with hospitals seeking effective, cost-efficient devices balanced by specialized needs.

**Bargaining Power of Suppliers:** Low, due to multiple component suppliers reducing dependency.

**Competitive Rivalry:** High, with firms competing on precision, battery life, and adaptive features.

### Market Opportunities and Challenges

#### Opportunities:

Rising neurological disease prevalence, with 50 million epilepsy cases and over 10 million PD patients in 2023, drives demand.

An aging population, projected to reach 2.1 billion over 60 by 2050, increases disease incidence.

Minimally invasive trends, supported by approximately 100,000 annual U.S. DBS surgeries, enhance adoption. Innovations like Medtronic's Percept and Boston Scientific's Vercise systems improve efficacy, while emerging markets offer growth potential.

#### Challenges:

High costs of DBS devices and surgeries limit accessibility in low-income regions.

Regulatory delays for adaptive systems pose hurdles.

Patient and clinician training for advanced DBS programming adds complexity.

#### Market News

In February 2025, Medtronic received FDA approval for BrainSense™ Adaptive DBS and Electrode Identifier.

In July 2023, Boston Scientific gained FDA approval for Vercise™ Neural Navigator 5 Software, enhancing DBS programming.

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