

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

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## **Abstracts**

### **Neuromodulation Devices Market Summary**

#### **Introduction**

Neuromodulation devices are advanced therapeutic tools that use electrical stimulation to manage neurological conditions like Parkinson's disease, epilepsy, chronic pain, and depression, available as spinal cord stimulators (SCS), deep brain stimulators (DBS), sacral nerve stimulators, vagus nerve stimulators (VNS), gastric electrical stimulators, and others. These devices are employed in hospitals, ambulatory surgery centers (ASCs), clinics, physiotherapy centers, and other settings. The market is driven by the rising prevalence of neurological disorders, with WHO data indicating 50 million people affected by epilepsy and 10 million by Parkinson's disease. The preference for low-risk, non-invasive treatments and approximately 200,000 annual DBS procedures globally further propel demand.

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

The global neuromodulation devices market is projected to reach between USD 3.1 billion and USD 5.3 billion in 2025, with a compound annual growth rate (CAGR) of 6.8% to 9.1% through 2030, reflecting disease prevalence and technological advancements.

#### **Regional Analysis**

**North America:** The U.S. leads with high adoption of DBS and SCS, while Canada focuses on chronic pain management.

**Europe:** Germany, France, and the UK dominate, driven by aging populations and neurological care.

**Asia Pacific:** China and India see rapid growth due to rising neurological disorders, while Japan prioritizes elderly solutions.

**Rest of the World:** Brazil expands neuromodulation access, and the Middle East, notably the UAE, invests in advanced therapies.

### Application Analysis

**Hospitals & Ambulatory Surgery Centers (ASCs):** Expected growth of 6.5-8.8%, driven by complex procedures. Trends focus on closed-loop systems.

**Clinics & Physiotherapy Centers:** Projected growth of 7.0-9.5%, linked to outpatient therapies. Developments emphasize portability.

**Others:** Anticipated growth of 6.2-8.5%, including home use. Advances prioritize patient accessibility.

### Type Analysis

**Spinal Cord Stimulators:** Expected growth of 7.0-9.2%, valued for chronic pain relief. Trends focus on wireless designs.

**Deep Brain Stimulators:** Projected growth of 6.8-9.0%, key for Parkinson's and epilepsy. Advances highlight adaptive stimulation.

**Sacral Nerve Stimulators:** Anticipated growth of 6.5-8.8%, suited for incontinence. Developments prioritize miniaturization.

**Vagus Nerve Stimulators:** Expected growth of 7.2-9.5%, driven by epilepsy and depression. Trends focus on non-invasive options.

**Gastric Electrical Stimulation:** Projected growth of 6.0-8.5%, key for gastroparesis.

Advances highlight efficacy.

Others: Anticipated growth of 6.5-9.0%, including TMS. Developments emphasize innovation.

### Key Market Players

Leading firms include Medtronic, offering advanced stimulators; Boston Scientific Corporation, enhancing pain management; Abbott, improving DBS technology; Nevro Corporation, specializing in SCS; Saluda Medical, innovating in closed-loop systems; Nexstim, focusing on TMS; LivaNova, targeting VNS; Neuropace, advancing epilepsy care; ElectroCore, enhancing non-invasive options; and Axonics, improving sacral stimulation. These companies 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 players can enter with innovative designs.

Threat of Substitutes: Moderate, with pharmaceuticals competing, though devices offer unique long-term benefits.

Bargaining Power of Buyers: Moderate, with hospitals seeking cost-effective, high-efficacy devices while balancing patient outcomes.

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

Competitive Rivalry: High, with firms competing on stimulation precision, device size, and patient monitoring.

### Market Opportunities and Challenges

#### Opportunities:

Epilepsy affecting 50 million and Parkinson's 10 million people globally highlight the need for neuromodulation devices.

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

Approximately 200,000 annual DBS surgeries boost adoption.

Innovations like Medtronic's Percept and Nevro's HF10 enhance efficacy, while emerging markets offer growth as healthcare access improves.

#### Challenges:

High costs of advanced devices limit adoption in low-income regions.

Regulatory delays for novel technologies slow market entry.

Reimbursement variability across regions affects penetration.

#### Market News

In July 2024, Mainstay Medical received approvals for its ReActiv8 system for full-body MRI compatibility.

In February 2024, Boston Scientific gained FDA approval for the WaveWriter SCS for non-surgical back pain.

In January 2024, Abbott launched the Liberta RC DBS, the smallest rechargeable DBS device.

In November 2023, Nevro acquired Vyrsa Technologies, enhancing SI joint pain solutions.

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