

# **Neuro-Inclusive Wearables Market Forecasts to 2032 – Global Analysis By Device Type (EEG Headsets, In-Ear Neuro-Sensing Devices, Neurofeedback-Enabled Headphones, Smart Glasses and Smart Helmets), Integration Mode, Technology, Application, End User and By Geography**

<https://marketpublishers.com/r/N921F4F7C1E0EN.html>

Date: September 2025

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: N921F4F7C1E0EN

## **Abstracts**

According to Statistics MRC, the Global Neuro-Inclusive Wearables Market is accounted for \$1.5 billion in 2025 and is expected to reach \$4.2 billion by 2032 growing at a CAGR of 16% during the forecast period. Neuro-Inclusive Wearables are digital devices designed to support cognitive, sensory, and neurological needs of users by monitoring brain activity, stress levels, and neural signals. These wearables incorporate technologies like electroencephalography (EEG), biosensors, and artificial intelligence for real-time insights into brain health. They aim to enhance inclusivity by addressing conditions such as autism, ADHD, and mental health challenges. Neuro-inclusive wearables are used in healthcare, wellness, and assistive technology domains for personalized support.

According to the World Health Organization (WHO), with over 1 billion people living with a neurological disorder, there is growing investment in wearable technology designed to support conditions like ADHD, autism, and anxiety.

Market Dynamics:

Driver:

Advancements in brain-computer interface tech

The Neuro-Inclusive Wearables market is driven by rapid advancements in brain-computer interface (BCI) technologies that enhance accessibility and cognitive assistance. These innovations enable individuals with neurological conditions to interact seamlessly with digital platforms, improving independence and quality of life. Fueled by breakthroughs in neural signal decoding and non-invasive sensors, BCI-driven wearables are gaining adoption across healthcare and assistive applications. Moreover, expanding research partnerships between universities and tech firms accelerate commercialization, firmly positioning BCI innovations as a key growth catalyst.

#### Restraint:

##### Complex regulatory approval processes

A significant restraint in the Neuro-Inclusive Wearables market is the complexity of regulatory approval processes for medical-grade devices. Strict requirements from agencies such as the FDA and EMA extend development timelines, elevating compliance costs for manufacturers. These rigorous standards are essential for safety but hinder smaller innovators from entering the market. Additionally, variations in approval protocols across regions complicate global commercialization strategies. As a result, lengthy regulatory pathways act as a bottleneck, slowing product launches and restraining market expansion.

#### Opportunity:

##### Growth in remote patient monitoring solutions

Expanding demand for remote patient monitoring creates promising opportunities for neuro-inclusive wearable adoption. Healthcare providers increasingly deploy wearables to monitor brain activity, detect stress, and track rehabilitation progress outside clinical environments. Spurred by rising incidences of neurological disorders and the push for personalized care, remote monitoring enhances patient outcomes while reducing hospital visits. Integration with telemedicine platforms further amplifies growth potential. As digital healthcare ecosystems evolve, wearables tailored for neurological inclusivity are set to play a central role in connected health solutions.

#### Threat:

##### Data security and privacy challenges

The Neuro-Inclusive Wearables market faces threats from escalating data security and privacy concerns. Wearables capture sensitive neurological and physiological data, making them prime targets for cyberattacks. Breaches not only compromise patient trust but also expose vendors to stringent penalties under data protection regulations such as GDPR and HIPAA. Growing consumer awareness about digital vulnerabilities intensifies hesitation toward adoption. Without robust encryption, anonymization, and compliance frameworks, security risks threaten to erode confidence and impede the widespread integration of neuro-inclusive wearables globally.

#### Covid-19 Impact:

The COVID-19 pandemic had a dual impact on the Neuro-Inclusive Wearables market. Initially, supply chain disruptions and delayed clinical trials slowed product rollouts. However, the pandemic spurred demand for digital health solutions, driving adoption of neuro-inclusive wearables for remote monitoring, rehabilitation, and mental wellness. Increased stress and neurological health concerns during lockdowns further boosted consumer interest. Healthcare systems rapidly pivoted to telehealth models, embedding wearable solutions as part of patient care. Consequently, COVID-19 accelerated long-term acceptance and integration of neuro-inclusive technologies.

The EEG headsets segment is expected to be the largest during the forecast period

The EEG headsets segment is expected to account for the largest market share during the forecast period, owing to their extensive use in neurological monitoring, cognitive research, and assistive communication technologies. These devices enable non-invasive brainwave tracking, making them vital for patients with neurological disorders and for wellness-focused applications like meditation and stress management. Fueled by advancements in miniaturized electrodes and wireless connectivity, EEG headsets are becoming increasingly user-friendly, supporting their dominance across healthcare, rehabilitation, and consumer wellness ecosystems.

The Inertial & Physiological Sensor Fusion segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the inertial & physiological sensor fusion segment is predicted to witness the highest growth rate, impelled by its ability to combine motion tracking with biometric insights for enhanced accuracy. By integrating data from accelerometers, gyroscopes, heart-rate monitors, and skin sensors, these wearables deliver

comprehensive neuro-physiological feedback. This fusion technology enhances real-time monitoring for sports, rehabilitation, and mental health applications. Rising demand for multimodal data analysis in personalized health and performance optimization fuels its rapid adoption, driving accelerated growth.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by strong government initiatives in digital healthcare, rapid urbanization, and rising investments in neurotechnology. Countries like China, Japan, and South Korea are advancing wearable R&D while fostering partnerships between tech startups and healthcare providers. Additionally, growing awareness of neurological health and expanding healthcare infrastructure support adoption. The region's massive population base and early adoption of consumer electronics position Asia Pacific as the dominant revenue generator.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, attributed to strong innovation ecosystems, supportive regulatory frameworks, and high consumer spending power. The U.S. is home to leading neurotechnology startups and universities pioneering wearable research. Increased prevalence of mental health conditions and demand for advanced therapeutic devices further amplify adoption. Moreover, growing integration of neuro-inclusive wearables into insurance-backed healthcare plans accelerates growth. This dynamic environment positions North America as the fastest-expanding regional market.

Key players in the market

Some of the key players in Neuro-Inclusive Wearables Market include Emotiv Inc., Neurable Inc., Kernel, NextMind (Snap Inc.), Muse (InteraXon Inc.), MindMaze SA, Cognixion, Bitbrain Technologies, NeuroSky Inc., OpenBCI, BioSemi, Brain Products GmbH, Compumedics Neuroscan, ANT Neuro, g.tec medical engineering GmbH, Neuroelectrics, Luxonis, and iMotions A/S.

Key Developments:

In July 2025, Neurable Inc. announced a partnership with Meta to integrate its dry-electrode EEG analytics platform into the next-generation Meta Quest Pro headset,

focusing on cognitive load monitoring for productivity and wellness applications.

In June 2025, Kernel launched its next-generation, wearable "Kernel Flow" headset with improved ergonomics and a 50% reduction in size, making continuous, high-fidelity hemodynamic brain recording feasible for clinical and research use outside the lab.

In May 2025, Muse (InteraXon Inc.) introduced the "Muse S2," a sleek, headband-style wearable that provides real-time neurofeedback for meditation and now includes features for tracking focus and managing ADHD symptoms throughout the workday.

#### Device Types Covered:

EEG Headsets

In-Ear Neuro-Sensing Devices

Neurofeedback-Enabled Headphones

Smart Glasses

Smart Helmets

#### Integration Modes Covered:

Standalone Consumer Devices

Enterprise / Clinical-Grade Systems

Embedded OEM Modules

#### Technologies Covered:

Electroencephalography (EEG) Sensors

Functional Near-Infrared Spectroscopy (fNIRS)

Inertial & Physiological Sensor Fusion

### Applications Covered:

Focus Training

Therapy Support

Fatigue Management

Neurorehabilitation

Human-Machine Interaction

### End Users Covered:

Consumers

Healthcare Providers & Clinics

Enterprises

Military & Defense

Research Institutions & Academia

### Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

## Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

### What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as

per the client's interest (Note: Depends on feasibility check)

### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### 1 EXECUTIVE SUMMARY

### 2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### 3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Technology Analysis
- 3.7 Application Analysis
- 3.8 End User Analysis
- 3.9 Emerging Markets
- 3.1 Impact of Covid-19

### 4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

## **5 GLOBAL NEURO-INCLUSIVE WEARABLES MARKET, BY DEVICE TYPE**

- 5.1 Introduction
- 5.2 EEG Headsets
- 5.3 In-Ear Neuro-Sensing Devices
- 5.4 Neurofeedback-Enabled Headphones
- 5.5 Smart Glasses
- 5.6 Smart Helmets

## **6 GLOBAL NEURO-INCLUSIVE WEARABLES MARKET, BY INTEGRATION MODE**

- 7.1 Introduction
- 7.2 Standalone Consumer Devices
- 7.3 Enterprise / Clinical-Grade Systems
- 7.4 Embedded OEM Modules

## **7 GLOBAL NEURO-INCLUSIVE WEARABLES MARKET, BY TECHNOLOGY**

- 7.1 Introduction
- 7.2 Electroencephalography (EEG) Sensors
- 7.3 Functional Near-Infrared Spectroscopy (fNIRS)
- 7.4 Inertial & Physiological Sensor Fusion

## **8 GLOBAL NEURO-INCLUSIVE WEARABLES MARKET, BY APPLICATION**

- 8.1 Introduction
- 8.2 Focus Training
- 8.3 Therapy Support
- 8.4 Fatigue Management
- 8.5 Neurorehabilitation
- 8.6 Human-Machine Interaction

## **9 GLOBAL NEURO-INCLUSIVE WEARABLES MARKET, BY END USER**

- 9.1 Introduction
- 9.2 Consumers
- 9.3 Healthcare Providers & Clinics
- 9.4 Enterprises

9.5 Military & Defense

9.6 Research Institutions & Academia

## **10 GLOBAL NEURO-INCLUSIVE WEARABLES MARKET, BY GEOGRAPHY**

10.1 Introduction

10.2 North America

10.2.1 US

10.2.2 Canada

10.2.3 Mexico

10.3 Europe

10.3.1 Germany

10.3.2 UK

10.3.3 Italy

10.3.4 France

10.3.5 Spain

10.3.6 Rest of Europe

10.4 Asia Pacific

10.4.1 Japan

10.4.2 China

10.4.3 India

10.4.4 Australia

10.4.5 New Zealand

10.4.6 South Korea

10.4.7 Rest of Asia Pacific

10.5 South America

10.5.1 Argentina

10.5.2 Brazil

10.5.3 Chile

10.5.4 Rest of South America

10.6 Middle East & Africa

10.6.1 Saudi Arabia

10.6.2 UAE

10.6.3 Qatar

10.6.4 South Africa

10.6.5 Rest of Middle East & Africa

## **11 KEY DEVELOPMENTS**

- 11.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 11.2 Acquisitions & Mergers
- 11.3 New Product Launch
- 11.4 Expansions
- 11.5 Other Key Strategies

## **12 COMPANY PROFILING**

- 12.1 Emotiv Inc.
- 12.2 Neurable Inc.
- 12.3 Kernel
- 12.4 NextMind (Snap Inc.)
- 12.5 Muse (InteraXon Inc.)
- 12.6 MindMaze SA
- 12.7 Cognixion
- 12.8 Bitbrain Technologies
- 12.9 NeuroSky Inc.
- 12.10 OpenBCI
- 12.11 BioSemi
- 12.12 Brain Products GmbH
- 12.13 Compumedics Neuroscan
- 12.14 ANT Neuro
- 12.15 g.tec medical engineering GmbH
- 12.16 Neuroelectrics
- 12.17 Luxonis
- 12.18 iMotions A/S

## List Of Tables

### LIST OF TABLES

Table 1 Global Neuro-Inclusive Wearables Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Neuro-Inclusive Wearables Market Outlook, By Device Type (2024-2032) (\$MN)

Table 3 Global Neuro-Inclusive Wearables Market Outlook, By EEG Headsets (2024-2032) (\$MN)

Table 4 Global Neuro-Inclusive Wearables Market Outlook, By In-Ear Neuro-Sensing Devices (2024-2032) (\$MN)

Table 5 Global Neuro-Inclusive Wearables Market Outlook, By Neurofeedback-Enabled Headphones (2024-2032) (\$MN)

Table 6 Global Neuro-Inclusive Wearables Market Outlook, By Smart Glasses (2024-2032) (\$MN)

Table 7 Global Neuro-Inclusive Wearables Market Outlook, By Smart Helmets (2024-2032) (\$MN)

Table 8 Global Neuro-Inclusive Wearables Market Outlook, By Integration Mode (2024-2032) (\$MN)

Table 9 Global Neuro-Inclusive Wearables Market Outlook, By Standalone Consumer Devices (2024-2032) (\$MN)

Table 10 Global Neuro-Inclusive Wearables Market Outlook, By Enterprise / Clinical-Grade Systems (2024-2032) (\$MN)

Table 11 Global Neuro-Inclusive Wearables Market Outlook, By Embedded OEM Modules (2024-2032) (\$MN)

Table 12 Global Neuro-Inclusive Wearables Market Outlook, By Technology (2024-2032) (\$MN)

Table 13 Global Neuro-Inclusive Wearables Market Outlook, By Electroencephalography (EEG) Sensors (2024-2032) (\$MN)

Table 14 Global Neuro-Inclusive Wearables Market Outlook, By Functional Near-Infrared Spectroscopy (fNIRS) (2024-2032) (\$MN)

Table 15 Global Neuro-Inclusive Wearables Market Outlook, By Inertial & Physiological Sensor Fusion (2024-2032) (\$MN)

Table 16 Global Neuro-Inclusive Wearables Market Outlook, By Application (2024-2032) (\$MN)

Table 17 Global Neuro-Inclusive Wearables Market Outlook, By Focus Training (2024-2032) (\$MN)

Table 18 Global Neuro-Inclusive Wearables Market Outlook, By Therapy Support

(2024-2032) (\$MN)

Table 19 Global Neuro-Inclusive Wearables Market Outlook, By Fatigue Management

(2024-2032) (\$MN)

Table 20 Global Neuro-Inclusive Wearables Market Outlook, By Neurorehabilitation

(2024-2032) (\$MN)

Table 21 Global Neuro-Inclusive Wearables Market Outlook, By Human-Machine Interaction (2024-2032) (\$MN)

Table 22 Global Neuro-Inclusive Wearables Market Outlook, By End User (2024-2032) (\$MN)

Table 23 Global Neuro-Inclusive Wearables Market Outlook, By Consumers (2024-2032) (\$MN)

Table 24 Global Neuro-Inclusive Wearables Market Outlook, By Healthcare Providers & Clinics (2024-2032) (\$MN)

Table 25 Global Neuro-Inclusive Wearables Market Outlook, By Enterprises (2024-2032) (\$MN)

Table 26 Global Neuro-Inclusive Wearables Market Outlook, By Military & Defense (2024-2032) (\$MN)

Table 27 Global Neuro-Inclusive Wearables Market Outlook, By Research Institutions & Academia (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

## I would like to order

Product name: Neuro-Inclusive Wearables Market Forecasts to 2032 – Global Analysis By Device Type (EEG Headsets, In-Ear Neuro-Sensing Devices, Neurofeedback-Enabled Headphones, Smart Glasses and Smart Helmets), Integration Mode, Technology, Application, End User and By Geography

Product link: <https://marketpublishers.com/r/N921F4F7C1E0EN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/N921F4F7C1E0EN.html>