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Neurostimulation Devices Market Forecasts to 2034 – Global Analysis By Product (Closed-Loop Stimulation Systems, Deep Brain Stimulation (DBS) and Other Products), By Device Type (Aneurysm Coiling & Embolization Devices, Cerebral balloon angioplasty & Stenting systems and Other Device Types), Disease Pathology, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Neurostimulation Devices Market is accounted for $11.3 billion in 2026 and is expected to reach $30.8 billion by 2034 growing at a CAGR of 13.3% during the forecast period. Neurostimulation devices are specialised instruments designed to modulate the nervous system's activity through electrical or chemical means. Implanted or applied externally, these devices target specific nerves or brain regions, managing neurological conditions like chronic pain, movement disorders, epilepsy, or depression by delivering controlled stimulation, aiding in symptom alleviation and enhancing the patient's quality of life.

According to the information distributed by the Epilepsy Center, by and by, around 50 million patients are living with epilepsy overall and around 2.4 million new cases are analyzed yearly.

Market Dynamics:

Driver:

Increasing prevalence of chronic disorders

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The rising prevalence of chronic disorders, such as chronic pain syndromes and neurological conditions like Parkinson's disease, epilepsy and treatment-resistant depression, acts as a significant driver in the neurostimulation device market. Neurostimulation devices offer an innovative approach, providing effective symptom relief. With an increasing population affected by these chronic ailments globally, there's heightened demand for advanced, non-pharmacological treatments, propelling the growth and adoption of neurostimulation devices as viable therapeutic solutions.

Restraint:

High device costs and limited insurance coverage

The substantial initial investment required for these advanced devices often limits patient access, creating financial barriers. Additionally, inadequate insurance coverage or reimbursement policies in certain regions restrict patient affordability and healthcare provider adoption. This situation impacts market growth by reducing patient pool sizes and healthcare facility investments, slowing down the adoption rate of neurostimulation devices.

Opportunity:

Advancements in personalized treatment options

Tailoring therapies to individual patient needs through innovative technologies and precision medicine approaches allows for more targeted interventions. Personalised treatments, considering factors like patient anatomy, neural responses and condition severity, enhance efficacy while reducing adverse effects. This trend not only improves patient outcomes and satisfaction but also drives market growth by fostering the development of customisable neurostimulation devices, meeting the diverse needs of patients and expanding the market's potential reach.

Threat:

Intense competition among key players

Intense competition among key players poses a threat due to potential market saturation and pricing pressures. With multiple companies vying for market share, innovation becomes critical, potentially leading to the faster obsolescence of existing technologies. Moreover, aggressive pricing strategies to gain a competitive edge might

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impact profitability and hinder investment in research and development. This competition-driven environment may also elevate marketing costs and hinder smaller players' entry, consolidating market dominance and potentially stifling innovation.

Covid-19 Impact:

The COVID-19 pandemic disrupted the neurostimulation devices market by causing delays in elective surgeries, including device implantation procedures. Reduced hospital capacities and diverted healthcare resources towards managing the pandemic led to deferred treatments and slowed device adoption. Supply chain disruptions and logistical challenges further affected manufacturing and distribution, impacting the accessibility of neurostimulation devices and consequently affecting market growth during the pandemic period.

The neurothrombectomy devices segment is expected to be the largest during the forecast period

The neurothrombectomy devices segment is poised to dominate the market due to rising incidences of stroke and thrombotic conditions. Technological advancements in clot retrieval systems, suction devices and snares offer minimally invasive solutions for removing clots from cerebral arteries, vital in treating acute ischemic strokes. As awareness grows regarding the effectiveness of neurothrombectomy in improving patient outcomes, coupled with favorable reimbursement policies, this segment anticipates substantial growth, addressing an unmet need in stroke management and positioning itself as a pivotal player in the neurostimulation devices market.

The depression segment is expected to have the highest CAGR during the forecast period

The depression segment is projected to experience the highest growth rate in market due to increasing awareness, expanding patient populations and the demand for alternative treatments for medication-resistant depression. Continuous advancements in neuromodulation technologies, such as deep brain stimulation (DBS) and transcranial magnetic stimulation (TMS), offer promising outcomes in alleviating depressive symptoms. With a growing emphasis on mental health and a preference for non-pharmacological interventions, the depression segment is anticipated to witness rapid adoption and substantial market growth during the forecast period.

Region with largest share:

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North America is set to secure the largest market share, due to its robust healthcare infrastructure, high investment in research and development and early adoption of innovative technologies. The region hosts prominent market players and enjoys favourable reimbursement policies, encouraging widespread adoption of neurostimulation therapies. Additionally, the increased prevalence of neurological disorders, coupled with a proactive approach towards addressing chronic conditions, positions North America at the forefront, driving substantial market growth and dominance in the neurostimulation devices industry.

Region with highest CAGR:

Europe is set to experience the highest CAGR in the neurostimulation devices market, owing to the increased healthcare expenditure, expanding R&D activities, and a growing geriatric population susceptible to neurological disorders. Favourable reimbursement policies and a proactive approach to adopting innovative medical technologies further contribute to this growth. Additionally, rising awareness among both healthcare providers and patients about the benefits of neurostimulation devices propels market expansion in the region.

Key players in the market

Some of the key players in Neurostimulation Devices Market include Abbott Laboratories, Axonics Modulation Technologies, BioControl Medical, Boston Scientific Corporation, LivaNova, Mainstay Medical, Medtronic, Merck & Co., Inc, MicroTransponder, Neuronetics, NeuroPace, Nevro Corp, Nexeon MedSystems, Saluda Medical, Soterix Medical, SPR Therapeutics, Stimwave Technologies, Synapse Biomedical and Zynex Medical.

Key Developments:

In May 2023, Abbott received FDA approval for its spinal cord stimulation (SCS) systems for treating chronic back pain in people who have not had or are not eligible to receive back surgery, known as non-surgical back pain. This new indication applies to all Abbott's SCS products in the United States, including the Eterna SCS platform and the Proclaim SCS family.

In August 2022, Merck announced a collaboration in its new Bioelectronics innovation field with neuroloop GmbH, a B. Braun subsidiary, to develop a neurostimulator device

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that can complement the existing drug therapies of patients with chronic inflammatory diseases.

Products Covered:

- Closed-Loop Stimulation Systems
- Deep Brain Stimulation (DBS)
- Motor Cortex Stimulation (MCS)
- Sacral Nerve Stimulation (SNS)
- Spinal Cord Stimulation (SCS)
- Trigeminal Nerve Stimulation (TNS)
- Vagus Nerve Stimulation (VNS)
- Other Products

Device Types Covered:

- Aneurysm Coiling & Embolization Devices
- Cerebral balloon angioplasty & Stenting systems
- Neurothrombectomy Devices

Disease Pathologies Covered:

- Arteriovenous Malformations and Fistulas
- Carotid Artery Stenosis
- Cerebral Aneuryms

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- Ischemic Strokes
- Other Diseases

Applications Covered:

- Depression
- Dystonia
- Epilepsy
- Gastroparesis
- Pain Management
- Parkinson's Disease
- Tremors
- Urinary and Fecal Incontinence
- Other Applications

End Users Covered:

- Hospitals
- Cognitive Care Centers
- Specialty Clinics
- Research Institutes
- Other End Users

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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

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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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- 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:

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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

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

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