

# **Flow Diversion Aneurysm Treatment Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (FDS, Intrasaccular flow disruption devices), By End User (Hospitals & Clinics, Ambulatory Centers, Others), By Region, and Competition**

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## **Abstracts**

Global Flow Diversion Aneurysm Treatment Market is anticipated to project impressive growth in the forecast period. The Flow Diversion Aneurysm Treatment Market is a rapidly evolving segment within the field of neurointerventional procedures, driven by the imperative need to address cerebral aneurysms—a potentially life-threatening condition. This market is characterized by the innovative use of flow diversion devices, a minimally invasive treatment approach designed to divert blood flow away from an aneurysm, promoting its occlusion and reducing the risk of rupture. Continuous innovation in flow diversion devices and neuroimaging techniques is expanding treatment options and improving patient outcomes. The increasing incidence of cerebral aneurysms, often associated with aging and other risk factors, fuels the demand for effective treatments. Flow diversion procedures are less invasive compared to traditional surgical approaches, resulting in reduced patient recovery times and hospital stays. The global aging demographic is contributing to the prevalence of cerebral aneurysms, elevating the demand for treatment.

Expanding healthcare infrastructure and access to specialized neurointerventional care are enhancing patient access to flow diversion treatments. Rising awareness about the consequences of untreated cerebral aneurysms and the availability of advanced treatments is driving patient and physician interest. The Flow Diversion Aneurysm Treatment Market is poised for continued growth as it offers a compelling alternative to

traditional surgical interventions, aligns with minimally invasive healthcare trends, and addresses the pressing need to manage cerebral aneurysms effectively. This market's trajectory reflects a commitment to advancing patient care, reducing mortality rates, and improving the quality of life for individuals at risk of aneurysm-related complications.

## Ky Market Drivers

### Minimally invasive treatment options

The Flow Diversion Aneurysm Treatment Market is experiencing significant growth, driven notably by the increasing adoption of minimally invasive treatment options. This trend reflects a paradigm shift in the approach to managing cerebral aneurysms, favoring less invasive procedures over traditional open surgeries. Several key factors contribute to the prominence of minimally invasive options in driving this market: Minimally invasive procedures involve smaller incisions or access points, resulting in less tissue damage, reduced pain, and quicker patient recovery times compared to open surgeries. This appeals to both patients and healthcare providers. Minimally invasive flow diversion treatments offer excellent patient outcomes, with lower complication rates and reduced risks of infection or bleeding. This factor contributes to higher patient satisfaction and a positive reputation for these procedures. Technological advancements in medical devices and imaging techniques have made minimally invasive treatments more precise and effective. The use of real-time imaging guidance enhances the accuracy of flow diversion procedures.

Minimally invasive treatments typically require shorter hospital stays, which reduces the healthcare burden, lowers costs, and increases healthcare facility efficiency. The less invasive nature of these procedures makes them accessible to a broader patient population, including those who may not be suitable candidates for traditional surgeries due to comorbidities. Both physicians and patients often prefer minimally invasive options due to their safety profile, reduced invasiveness, and quicker recovery, contributing to their growing popularity. As minimally invasive techniques continue to advance and gain acceptance, they are reshaping the landscape of cerebral aneurysm treatment. The Flow Diversion Aneurysm Treatment Market benefits significantly from this trend as it aligns with the goals of improving patient outcomes, enhancing quality of life, and reducing the overall healthcare burden associated with aneurysm management.

### Increasing prevalence of cerebral aneurysms

The Flow Diversion Aneurysm Treatment Market is experiencing robust growth, propelled in large part by the increasing prevalence of cerebral aneurysms. This medical condition, characterized by the weakening and ballooning of blood vessels in the brain, poses a significant health risk and drives the demand for effective treatment options. Several key factors contribute to this prevalence-driven market expansion: The global aging demographic is a primary contributor to the rising prevalence of cerebral aneurysms. As individuals age, the structural integrity of blood vessels can weaken, increasing the likelihood of aneurysm formation. Unhealthy lifestyle choices such as smoking, excessive alcohol consumption, and a sedentary lifestyle are associated with an increased risk of cerebral aneurysms. As these behaviors persist, the prevalence of aneurysms continues to rise. Improved diagnostic techniques, such as advanced neuroimaging and non-invasive screening, have enhanced the detection and diagnosis of cerebral aneurysms. This increased detection has led to a higher reported incidence of the condition. Growing awareness campaigns and healthcare provider education have led to earlier detection and diagnosis of aneurysms, increasing the overall number of cases identified.

Certain genetic factors can increase an individual's susceptibility to developing cerebral aneurysms, contributing to the prevalence of the condition, especially within families with a history of aneurysms. As the prevalence of cerebral aneurysms continues to rise, there is a growing need for effective treatment options. Flow diversion procedures have emerged as a vital tool in managing these conditions, offering patients a minimally invasive and highly effective treatment choice. This prevalence-driven demand is expected to sustain the growth of the Flow Diversion Aneurysm Treatment Market in the coming years.

## Key Market Challenges

### High procedural costs

High procedural costs represent a significant challenge for the Flow Diversion Aneurysm Treatment Market. These costs encompass various aspects of the treatment process, including the price of flow diversion devices, hospital fees, physician charges, and post-procedure care. Several factors contribute to the elevated costs associated with flow diversion procedures: Flow diversion devices, while effective, can be expensive. The cost of these specialized implants used to divert blood flow away from the aneurysm can be a substantial portion of the overall procedure expenses. Neurointerventional require specialized training to perform flow diversion procedures

safely and effectively. This training incurs additional costs, including education and certification. Patients who undergo flow diversion treatments often require comprehensive pre-operative assessments, prolonged hospital stays, and follow-up care. This complexity drives up healthcare costs.

Advancements in technology and medical devices can lead to higher upfront costs, although they may offer long-term benefits in terms of improved outcomes and reduced complications. In some healthcare systems, reimbursement rates for flow diversion procedures may not adequately cover the actual costs incurred by hospitals and physicians, creating financial constraints. High procedural costs can also pose financial challenges for patients, potentially limiting their access to this advanced treatment option. Addressing the challenge of high procedural costs in the Flow Diversion Aneurysm Treatment Market requires a multi-faceted approach. This includes continued research and development to optimize the cost-effectiveness of flow diversion devices, improved reimbursement strategies, and efforts to expand access to specialized neurointerventional care. Overcoming this challenge is essential to ensure that patients have equitable access to life-saving treatment options while maintaining the sustainability of healthcare systems.

Limited availability of skilled neurointerventional.

The limited availability of skilled neurointerventionalists poses a substantial challenge to the Flow Diversion Aneurysm Treatment Market. Flow diversion procedures require a high level of expertise and precision, and the scarcity of trained neurointerventionalists can hinder patient access and the adoption of these advanced treatments. Several factors contribute to this challenge: Neurointerventional procedures, including flow diversion, demand specialized training and experience that goes beyond standard medical education. Neurointerventionalists need to be proficient in navigating complex vascular anatomy and utilizing advanced imaging techniques.

The number of neurointerventionalists is limited compared to the growing demand for these procedures. This shortage results in longer wait times for patients seeking treatment and geographic disparities in access to specialized care. Skilled neurointerventionalists tend to be concentrated in urban or academic medical centers, leaving patients in rural or underserved areas with limited access to their expertise. High patient demand and a limited workforce can lead to heavy workloads for neurointerventionalists, potentially contributing to burnout and reducing the number of practitioners available to perform these procedures. The extensive training required to become a neurointerventionalist, which often spans several years, can deter medical

professionals from pursuing this specialty. Addressing the limited availability of skilled neurointerventionalists in the Flow Diversion Aneurysm Treatment Market necessitates efforts to expand training programs, promote the field as an attractive career choice, and incentivize practitioners to work in underserved areas. This challenge underscores the importance of investing in the development and retention of specialized medical professionals to ensure that patients have equitable access to life-saving flow diversion treatments.

## Key Market Trends

### Growing adoption of flow diversion techniques

The growing adoption of flow diversion techniques represents a significant trend in the Flow Diversion Aneurysm Treatment Market. This trend is characterized by an increasing preference among neurointerventionalists and patients for flow diversion procedures as a primary method for managing cerebral aneurysms. Several key factors contribute to the rising adoption of these techniques: Flow diversion procedures are minimally invasive compared to traditional open surgical approaches. This less invasive nature attracts patients seeking treatments that offer shorter recovery times, reduced pain, and smaller incisions.

Flow diversion techniques have demonstrated high efficacy in treating complex, wide-necked, and fusiform aneurysms that were once challenging to manage. This effectiveness has led to increased trust and acceptance among both physicians and patients. Ongoing advancements in flow diversion devices, including improved design, materials, and delivery systems, have enhanced their safety and efficacy. These innovations have encouraged wider adoption. Patients who undergo flow diversion procedures often experience positive outcomes, with lower rates of aneurysm recurrence and reduced risk of complications. These outcomes contribute to patient satisfaction and confidence in the treatment. The expanding pool of neurointerventionalists trained in flow diversion techniques has led to greater availability of these procedures in medical centers worldwide. A growing body of clinical evidence supports the effectiveness of flow diversion in preventing aneurysm rupture, further driving adoption.

Increased patient awareness and education regarding treatment options have empowered individuals to actively seek out flow diversion as a preferred treatment choice. As the adoption of flow diversion techniques continues to rise, it is likely to reshape the landscape of cerebral aneurysm management. This trend aligns with the

broader shift toward minimally invasive procedures in healthcare and underscores the importance of ongoing research and development to further enhance the safety and effectiveness of flow diversion treatments.

### Advancements in neuroimaging technologies

Advancements in neuroimaging technologies are a prominent and transformative trend in the Flow Diversion Aneurysm Treatment Market. These innovations encompass cutting-edge imaging modalities and techniques that play a pivotal role in the planning, execution, and post-procedure assessment of flow diversion procedures. Several key factors underscore the significance of this trend:

Advanced neuroimaging technologies enable clinicians to accurately characterize aneurysms, including their size, location, morphology, and hemodynamic properties. This precision is crucial for selecting the most appropriate flow diversion device and planning the procedure. Real-time imaging guidance during flow diversion procedures enhances the accuracy and safety of device placement. Techniques such as fluoroscopy, 3D rotational angiography, and intraoperative magnetic resonance imaging (MRI) provide dynamic visualization, ensuring optimal device deployment. Post-procedure imaging allows clinicians to assess the immediate results of flow diversion, confirm aneurysm occlusion, and detect any complications. Non-invasive imaging modalities like CT angiography and MRI play a vital role in monitoring patient progress.

Advanced imaging facilitates personalized treatment strategies, as clinicians can tailor flow diversion procedures based on aneurysm-specific characteristics. This individualized approach enhances treatment outcomes and reduces the risk of complications. Some modern imaging techniques, such as cone-beam CT, offer improved image quality with lower radiation exposure, enhancing patient safety during the procedure. Neuroimaging advancements drive research and development efforts in the field, encouraging innovation in both imaging technologies and flow diversion devices.

Patients benefit from improved imaging, as it allows them to visualize and better understand their condition and treatment plan, fostering informed decision-making. Overall, advancements in neuroimaging technologies empower neurointerventional to deliver safer, more precise, and personalized flow diversion treatments. This trend not only elevates patient care but also contributes to the ongoing growth and development of the Flow Diversion Aneurysm Treatment Market.



## Segmental Insights

### Product Insights

Based on the Product, Flow Diverting Stents (FDS) have emerged as a dominant force in the Flow Diversion Aneurysm Treatment Market. These specialized devices have revolutionized the treatment of cerebral aneurysms by offering a highly effective and minimally invasive solution. Several factors contribute to the dominance of FDS in this market: Flow diverting stents have demonstrated exceptional efficacy in diverting blood flow away from aneurysms, promoting natural healing and aneurysm occlusion. Their effectiveness is particularly notable in treating complex and wide-necked aneurysms.

FDS procedures are minimally invasive, involving the placement of a stent-like device within the affected blood vessel. This approach minimizes tissue damage, reduces patient discomfort, and shortens recovery times. FDS is suitable for a broad range of aneurysm types, making it a versatile option for both routine and complex cases. This versatility has contributed to its widespread adoption. Ongoing research and development efforts have led to the development of advanced FDS devices with improved navigational properties, deployment mechanisms, and compatibility with various vascular anatomies. Patients who undergo FDS procedures often experience excellent outcomes, with high rates of aneurysm occlusion and low complication rates. These outcomes instill confidence in both patients and healthcare providers.

Extensive clinical research and studies have validated the safety and efficacy of FDS, further bolstering its reputation and adoption. FDS procedures align with patient preferences for minimally invasive treatments, enhancing their acceptance and willingness to undergo treatment. Overall, Flow Diverting Stents have become the go-to choice for neurointerventionalists when addressing cerebral aneurysms. Their proven efficacy, safety profile, and minimally invasive nature have solidified their dominance in the Flow Diversion Aneurysm Treatment Market, offering patients a promising and effective solution for managing this critical medical condition.

### End User Insights

Hospitals play a dominant role in the Flow Diversion Aneurysm Treatment Market due to several key factors that make them the primary setting for these complex procedures. Hospitals, especially those equipped with specialized neurointerventional departments or comprehensive stroke centers, have become the preferred choice for patients and healthcare providers for flow diversion aneurysm treatments. Here's why hospitals hold

this dominant position: Hospitals often house highly specialized teams of neurointerventionalists who possess the expertise and experience required for performing flow diversion procedures. These medical professionals are trained to navigate the intricacies of cerebral anatomy and effectively deploy flow diversion devices.

Hospitals are equipped with state-of-the-art neuroimaging facilities, including angiography suites and intraoperative MRI or CT scanners. These advanced technologies provide real-time guidance during procedures, enhancing precision and safety. Hospitals offer comprehensive patient care, from pre-operative evaluation to post-procedure monitoring and rehabilitation. This holistic approach ensures that patients receive high-quality, coordinated care throughout their treatment journey. In cases where aneurysms rupture or present imminent danger, hospitals are equipped to provide emergency care and immediate intervention, potentially saving lives. Hospitals have the infrastructure and resources to handle the complexities of flow diversion procedures, including access to operating rooms, specialized equipment, and intensive care units. Hospitals are hubs for medical research and innovation, fostering ongoing advancements in the field of neurointervention. This encourages the development of improved flow diversion techniques and devices.

Patients tend to trust hospitals as established healthcare institutions, making them more likely to choose hospitals for complex procedures like flow diversion. In summary, hospitals offer the comprehensive expertise, advanced technology, and a multidisciplinary approach required for successful flow diversion aneurysm treatments. Their role as the primary setting for these procedures underscores the critical role they play in ensuring the safety and effectiveness of patient care in the Flow Diversion Aneurysm Treatment Market.

## Regional Insights

North America has emerged as the dominant region in the Flow Diversion Aneurysm Treatment Market for several compelling reasons, cementing its position as a leader in neurointerventional care and innovation. The following factors elucidate why North America plays a central role in this market: North America boasts a robust and advanced healthcare infrastructure, with state-of-the-art hospitals, specialized neurointerventional centers, and cutting-edge imaging facilities. These resources are critical for the successful deployment of flow diversion techniques. The region is home to a highly skilled and experienced neurointerventional workforce, including neurosurgeons and interventional radiologists, who are proficient in performing flow



diversion procedures. Their expertise ensures the safe and effective treatment of patients.

North America is a global hub for medical innovation, with numerous research institutions, universities, and medical device companies dedicated to advancing neurointerventional technologies. This fosters ongoing research and development, leading to the introduction of innovative flow diversion devices and techniques. The region conducts extensive clinical research and trials in the field of neurointervention, generating substantial clinical evidence supporting the safety and efficacy of flow diversion procedures. Patients in North America often seek the latest and most advanced medical treatments, and they are more likely to be aware of flow diversion as a viable option for aneurysm treatment. This drives demand and adoption.

North America's high healthcare spending and insurance coverage contribute to patients' access to specialized care, including flow diversion treatments. The region has a well-established regulatory framework that ensures the safety and effectiveness of medical devices, further instilling confidence in flow diversion procedures. Overall, North America's leadership in the Flow Diversion Aneurysm Treatment Market is a result of its comprehensive healthcare ecosystem, a culture of medical innovation, and a highly skilled medical workforce. These factors collectively position North America at the forefront of neurointerventional care and propel the region's dominance in this critical healthcare sector.

### Key Market Players

Acandis GmbH

BALT Group

Cardinal Health Inc

Endologix LLC

Evasc Medical Systems Corp

Imperative Care Inc

InspireMD Inc

Johnson and Johnson

Lepu Medical Technology Beijing Co. Ltd

Medtronic Plc

Report Scope:

In this report, the Global Flow Diversion Aneurysm Treatment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Flow Diversion Aneurysm Treatment Market, By Product:

FDS

Intrasaccular flow disruption devices

Flow Diversion Aneurysm Treatment Market, By End User:

Hospitals

Specialty clinics

Flow Diversion Aneurysm Treatment Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Flow

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Diversion Aneurysm Treatment Market.

Available Customizations:

Global Flow Diversion Aneurysm Treatment market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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