

# **Nerve Monitoring Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Monitors, Electrodes, Ancillary Products), By Technology (Electroencephalogram (EEG), Evoked Potential (Somatosensory Evoked Potentials (SSEP), Transcranial Electrical Motor Evoked Potentials (TCeMEP), Brainstem Auditory Evoked Potentials (BAEP), Visual Evoked Potentials (VEP)), Electromyography (EMG), Electrocorticography (ECoG)), By Region and Competition**

<https://marketpublishers.com/r/NDFE8089660EEN.html>

Date: January 2024

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: NDFE8089660EEN

## **Abstracts**

Global Nerve Monitoring Devices Market was valued at USD 1.52 Billion in 2022 and is anticipated to project steady growth in the forecast period with a CAGR of 4.25% through 2028. Nerve monitoring devices have become an indispensable tool in the field of healthcare. These cutting-edge devices play a pivotal role in ensuring the safety and efficacy of various surgical procedures, especially those involving delicate nerves. As the world continues to witness advancements in medical technology, the global nerve monitoring devices market is experiencing significant growth and transformation. Nerve monitoring devices, also known as intraoperative neuromonitoring (IONM) devices, are designed to assess and monitor the integrity of nerves during surgery. They provide real-time data and alerts to surgeons, helping them avoid accidental nerve damage, especially in complex and delicate procedures like spinal and cranial surgeries. The increasing demand for minimally invasive surgeries, which require precise and safe procedures, has driven the adoption of nerve monitoring devices.

The increasing prevalence of chronic diseases and conditions such as spinal disorders, neurodegenerative diseases, and orthopedic issues is a primary driver of the nerve monitoring devices market. These conditions often necessitate surgical interventions where nerve monitoring devices play a crucial role in preventing nerve damage. Ongoing advancements in nerve monitoring technology have enhanced the accuracy and usability of these devices. This includes the development of wireless systems, improved electrode design, and integration with other surgical equipment. Surgeons now have access to more sophisticated and user-friendly tools. The growing preference for minimally invasive surgical techniques has increased the demand for nerve monitoring devices. These devices provide real-time feedback during complex procedures, enhancing the surgeon's ability to navigate delicate nerve structures with precision. As the global population ages, there is a higher incidence of age-related conditions requiring surgical interventions. Nerve monitoring devices become critical in these procedures, as older patients are often at higher risk for nerve damage. The awareness about the benefits of nerve monitoring devices among healthcare professionals is growing. Surgeons are increasingly recognizing the importance of these devices in improving patient outcomes and minimizing post-operative complications.

## Key Market Drivers

### Increasing Incidence of Nerve Disorders is Driving the Global Nerve Monitoring Devices Market

The global nerve monitoring devices market is experiencing substantial growth, largely driven by the increasing incidence of nerve disorders. Nerve disorders, encompassing a wide range of conditions like neuropathy, radiculopathy, and carpal tunnel syndrome, affect millions of people worldwide. These disorders can result from various factors, including genetics, injuries, and underlying medical conditions. The increasing incidence of nerve disorders is a matter of concern, affecting the quality of life for those afflicted and placing a considerable burden on healthcare systems. As a result, there is a growing need for advanced diagnostic and monitoring tools. Nerve monitoring devices have gained prominence in the healthcare landscape, thanks to their ability to assess and track nerve function in real-time. These devices employ advanced technology to monitor electrical signals in nerves during surgical procedures, making them invaluable for complex surgeries, such as spinal, neurologic, and orthopedic procedures. By providing surgeons with crucial data on nerve integrity, these devices enhance surgical precision and patient safety.

The world's population is generally getting older, and many nerve disorders are more common among older individuals. Conditions such as Alzheimer's disease, Parkinson's disease, and peripheral neuropathy tend to become more prevalent with age. Medical advances and improved diagnostic techniques have led to better detection of nerve disorders. As healthcare providers become more adept at recognizing these conditions, more cases are being identified and reported. Certain lifestyle factors, such as sedentary habits, poor diet, and increasing stress, can contribute to the development of nerve disorders like carpal tunnel syndrome and chronic stress-related conditions. Exposure to environmental toxins, pollutants, and certain chemicals may increase the risk of developing nerve disorders. This includes conditions like multiple sclerosis, where environmental factors may interact with genetic susceptibility. Some nerve disorders have a genetic component, and individuals with a family history of such disorders may be at a higher risk of developing them. Genetic factors play a role in conditions like Huntington's disease and amyotrophic lateral sclerosis (ALS). The global nerve monitoring devices market is poised for significant growth in the coming years. According to various market research reports, the market is expected to witness substantial expansion due to the increasing prevalence of nerve disorders and the growing adoption of these devices in surgical procedures.

### Increasing Investments in Research and Development is Driving the Global Nerve Monitoring Devices Market

A key driver behind the expansion of the global nerve monitoring devices market is the substantial increase in investments in research and development (R&D). Research and development have always been at the heart of medical innovation. In the context of nerve monitoring devices, R&D efforts are driving progress on multiple fronts. With increased investments in R&D, companies are developing more advanced nerve monitoring devices that are not only more accurate but also more user-friendly. These devices incorporate cutting-edge technology, such as artificial intelligence and machine learning algorithms, to enhance diagnostic accuracy.

Ongoing R&D investments have led to the miniaturization of nerve monitoring devices. Smaller, portable devices are more convenient for both patients and healthcare providers. This trend has opened new possibilities for remote monitoring and home healthcare. Many modern nerve monitoring devices are equipped with wireless connectivity, allowing real-time data transmission to electronic health records and other healthcare systems. This not only streamlines patient care but also facilitates research and data analysis. R&D investments are enabling the development of nerve monitoring devices tailored to specific neurological conditions. These specialized devices can

provide highly accurate data, improving the precision of diagnosis and treatment planning. Increasing R&D investments are driving globalization in the nerve monitoring device market. Companies are expanding their operations to reach a broader international customer base, ensuring that patients worldwide have access to these critical technologies.

## Key Market Challenges

### Technological Advancements and Integration

One of the primary challenges in the nerve monitoring devices market is keeping up with rapid technological advancements. The need for more accurate, user-friendly, and cost-effective monitoring devices constantly pushes manufacturers to innovate. As technology evolves, companies must continually invest in research and development to remain competitive. Integration with other surgical equipment and electronic health records systems is also critical but can be complex and expensive. To address this challenge, manufacturers are collaborating with research institutions and healthcare providers to develop cutting-edge devices. Additionally, investments in artificial intelligence and machine learning are helping in data analysis and improving the overall efficiency of nerve monitoring systems.

### Regulatory Hurdles

Nerve monitoring devices are medical devices that require rigorous regulatory approvals to ensure patient safety. The process of getting approvals from various national and international regulatory bodies can be time-consuming and expensive. Furthermore, different regions have varying regulatory requirements, which adds to the complexity, especially for companies aiming to enter multiple markets.

Companies in the nerve monitoring devices market must have a robust regulatory affairs team that can navigate the complex landscape of approvals. Collaborating with regulatory consultants and keeping abreast of changing regulations is essential to address this challenge.

### Reimbursement Issues

Reimbursement policies have a significant impact on the adoption of nerve monitoring devices. The lack of consistent and favorable reimbursement policies in some regions can discourage healthcare providers from investing in these devices. Patients may also

face financial burdens when nerve monitoring procedures are not adequately covered.

Manufacturers need to work closely with healthcare policymakers and insurance companies to demonstrate the clinical and economic benefits of nerve monitoring. Clear, evidence-based arguments are crucial in advocating for better reimbursement policies to drive market growth.

### High Initial Costs

Nerve monitoring devices, while essential, can be expensive to purchase and maintain. The high initial investment costs can deter smaller healthcare facilities from adopting these technologies, limiting market growth. Maintenance and ongoing training costs further add to the financial burden.

To mitigate this challenge, manufacturers are exploring various business models, such as leasing options and bundled service packages, to make the devices more accessible to a broader range of healthcare providers. Cost-effectiveness studies and long-term savings analyses are also being employed to justify the initial expenses.

### Market Competition

The global nerve monitoring devices market is highly competitive, with several established players and new entrants vying for market share. This competition can result in price wars, squeezing profit margins. Companies must differentiate themselves through innovative features, superior customer support, and strong branding to stand out in this crowded marketplace.

### Key Market Trends

#### Technological Advancements

The field of medical technology has witnessed remarkable advancements in recent years, with cutting-edge innovations revolutionizing patient care and diagnostic processes. Among these developments, the global nerve monitoring devices market stands out as a prime example of how technology is driving progress in healthcare. Nerve monitoring devices have become indispensable tools for medical professionals, helping them monitor the nervous system during surgical procedures, diagnosis, and treatment. Nerve monitoring devices are utilized in a wide range of medical fields. Intraoperative nerve monitoring helps surgeons pinpoint nerve pathways and assess

their functionality, reducing the risk of nerve damage during intricate procedures. During orthopedic surgeries, nerve monitoring devices assist in ensuring the preservation of nerve function, especially when dealing with spine and extremity procedures. These devices are invaluable in minimizing the risk of injury to facial nerves and vocal cords during head and neck surgeries. Nerve monitoring devices are used to protect the recurrent laryngeal nerves and vagus nerves during cardiac surgeries. In urological procedures, nerve monitoring is essential for preserving sexual function and urinary continence.

The global nerve monitoring devices market has been on an upward trajectory, largely due to continuous technological advancements. Technological advancements have led to the development of smaller and more portable nerve monitoring devices. These devices are easier to handle, reducing the complexity of procedures and making them more accessible for healthcare professionals. Advanced nerve monitoring devices provide real-time data analysis, allowing surgeons and medical professionals to make immediate decisions during surgery. This real-time feedback minimizes the risk of nerve damage and improves patient outcomes. Nerve monitoring devices are increasingly being integrated with imaging technologies like MRI and CT scans. This integration provides a comprehensive view of the patient's nervous system, enhancing pre-surgical planning and precision. AI and machine learning algorithms are being employed to enhance the accuracy and interpretability of nerve monitoring data. These technologies enable predictive analytics and help identify potential issues before they escalate. Many modern nerve monitoring devices feature wireless connectivity, allowing for seamless data transfer and integration with electronic health records (EHR) systems. This streamlines patient management and reduces the margin for error in documentation. Technological advancements have led to the development of nerve monitoring devices that are more patient friendly. This not only improves patient comfort but also reduces the risk of post-operative complications and pain.

## Segmental Insights

## Product Insights

Based on the category of product, Monitors emerged as the dominant player in the global market for Nerve Monitoring Devices in 2022. Nerve monitoring devices have witnessed a surge in demand due to their ability to improve patient outcomes and enhance surgical precision. They are instrumental in surgeries involving the nervous system, such as spine and brain surgeries, where inadvertent nerve damage can lead to serious complications for patients. As a result, healthcare providers are increasingly



adopting nerve monitoring devices to ensure that patients receive the best possible care. Monitors provide surgeons with real-time feedback on nerve function during surgery, enabling them to make immediate adjustments if any issues arise. This feature is critical in preventing nerve damage and improving the overall safety of surgical procedures. Monitors are versatile and can be used in a wide range of surgical procedures, from complex neurosurgery to more routine orthopaedic surgeries. This adaptability has made them a preferred choice for medical professionals. By minimizing the risk of nerve damage, monitors contribute to enhanced patient safety and reduce the likelihood of post-operative complications. This not only benefits patients but also lowers the healthcare system's overall costs. With the increase in the number of surgeries worldwide, the demand for nerve monitoring devices, particularly monitors, has surged. This trend is expected to continue as healthcare systems in various countries prioritize patient safety and surgical outcomes.

### Technology Insights

The Evoked Potential segment is projected to experience rapid growth during the forecast period. Evoked Potential technology offers high levels of accuracy and reliability. By stimulating nerves and recording their responses, EP technology allows surgeons and healthcare professionals to monitor nerve function in real time. This ensures that any potential damage is detected immediately, reducing the risk of complications during surgery. One of the key reasons for the dominance of EP technology is its versatility. It can be applied in various medical procedures, including spinal, neurosurgery, orthopedic, and vascular surgeries. This adaptability has made it the preferred choice for monitoring nerves across different medical specialties.

### Regional Insights

North America emerged as the dominant player in the global Nerve Monitoring Devices market in 2022, holding the largest market share in terms of value. One of the primary reasons behind North America's leadership in the nerve monitoring devices market is its continuous commitment to technological innovation. The region boasts a well-established medical technology industry with significant investments in research and development. Companies in North America have consistently pushed the boundaries of technology, resulting in the creation of state-of-the-art nerve monitoring devices that are more accurate and less invasive. North America boasts a robust healthcare infrastructure, characterized by advanced medical facilities, skilled healthcare professionals, and high patient demand for sophisticated medical procedures. This strong healthcare ecosystem provides a fertile ground for the adoption of nerve

monitoring devices. The availability of well-equipped hospitals and surgical centers supports the widespread use of these devices in various surgical applications. Neurological disorders, such as epilepsy, Parkinson's disease, and peripheral nerve injuries, are on the rise in North America. The growing prevalence of these conditions has led to an increased demand for nerve monitoring devices. These devices are not only essential for the diagnosis and treatment of neurological disorders but also play a pivotal role in the management of surgical procedures related to these conditions.

### Key Market Players

1. Medtronic Plc.
2. NuVasive, Inc.
3. Natus Medical Inc.
4. Neuspera Medical
5. Langer Medical GmbH
6. Neurosign Surgical
7. Cadwell Laboratories
8. Compumedics Limited
9. Electrical Geodesics Inc
10. Nihon Kohden Corporation

### Report Scope:

In this report, the Global Nerve Monitoring Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Nerve Monitoring Devices Market, By Product:

Monitors



Electrodes

Ancillary Products

Nerve Monitoring Devices Market, By Technology:

Electroencephalogram (EEG)

Evoked Potential

Electromyography (EMG)

Electrocorticography (ECoG)

Nerve Monitoring Devices 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 Nerve Monitoring Devices Market.

## Available Customizations:

Global Nerve Monitoring Devices 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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