

North America Noninvasive Traumatic Brain Injury Diagnostic Equipment Market Size and Forecast (2021 - 2031)

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Abstracts

The North America Noninvasive Traumatic Brain Injury (TBI) Diagnostic Equipment Market is projected to grow significantly, reaching approximately US\$ 1,648.8 million by 2031, up from US\$ 724.9 million in 2024. This growth represents a compound annual growth rate (CAGR) of 12.5% from 2025 to 2031.

Executive Summary and Market Analysis

The rising incidence of TBI is creating a considerable economic impact, necessitating the development of innovative noninvasive diagnostic methods. Techniques such as near-infrared spectroscopy (NIRS), transcranial Doppler (TCD) ultrasound, and advanced imaging technologies have transformed TBI assessment, providing safer, faster, and more cost-effective alternatives to traditional imaging methods like CT scans. These innovations allow healthcare professionals to detect and monitor brain injuries more effectively, leading to improved patient outcomes.

There is an increasing demand for portable and point-of-care diagnostic solutions. Devices like BrainScope One exemplify this trend, offering rapid, noninvasive assessments that can be utilized in emergency situations, thereby minimizing the reliance on expensive and time-consuming imaging procedures. This is particularly advantageous in areas with limited access to advanced imaging technologies.

The integration of artificial intelligence (AI) and machine learning (ML) into diagnostic tools is enhancing the accuracy and efficiency of TBI detection. For instance, the development of interpretable 3D multi-modal residual convolutional neural networks (MRCNN) has shown promising results in diagnosing mild TBI, providing improved

specificity and accuracy compared to traditional CT-based models. These AI-driven methodologies facilitate quicker and more precise diagnoses, which are crucial for timely intervention and management of TBI patients.

Support from the US government through funding and regulatory frameworks is accelerating the adoption of noninvasive diagnostic technologies. Initiatives aimed at improving trauma care and expanding access to advanced diagnostics are being implemented. Furthermore, the competitive landscape among medical device companies in North America fosters innovation in TBI diagnostic equipment. The region's advanced healthcare infrastructure, high prevalence of TBI, and commitment to research and development contribute to its leadership in the noninvasive TBI diagnostic equipment market.

Strategic Insights

Market Segmentation Analysis

The North America Noninvasive TBI Diagnostic Equipment Market is segmented by various techniques, including:

- Electroencephalography (EEG)
- Brain-computer interface (BCI)
- Eye tracking and near-infrared spectroscopy (NIRS)
- Magnetic resonance imaging (MRI)
- Magnetoencephalography (MEG)
- Transcranial magnetic stimulation (TMS)
- Cerebral metabolic rate of oxygen (CMRO₂)
- Intracranial Pressure
- Others

In 2024, the MRI segment dominated the market.

Additionally, the market is segmented by non-invasive ICP methods, including TCD, Tympanic Membrane Displacement (TMD), Optic Nerve Sheath Diameter (ONSD), MRI, CT, and others, with MRI and CT leading in 2024. The market is also divided by device type into imaging devices and monitoring devices, with imaging devices holding the largest share in 2024. By end user, hospitals and clinics dominated the market.

Market Outlook

The integration of multimodal and hybrid diagnostic platforms is addressing the limitations of single-modality approaches, which often fail to capture the complexity of TBI. By combining various noninvasive techniques, these platforms provide a more comprehensive assessment, enhancing diagnosis, prognosis, and treatment planning.

Recent developments emphasize the creation of seamless, data-driven diagnostic systems. While imaging techniques like CT and MRI are vital for identifying structural damage, they may overlook subtle neuronal injuries common in mild TBI. Blood biomarkers such as Glial Fibrillary Acidic Protein (GFAP) and Ubiquitin C-terminal Hydrolase L1 (UCH-L1) offer rapid, objective measures of cellular injury that may not be visible on scans. Integrated platforms are being developed to utilize both imaging and biomarker data, potentially involving a portable blood test that, if positive, triggers an AI-enhanced neuroimaging scan for detailed analysis.

Country Insights

The North American market is primarily segmented into the United States, Canada, and Mexico, with the United States holding the largest market share in 2024. An estimated 1.7 million individuals sustain mild TBI annually in the US, highlighting the urgent need for effective diagnostic tools. EEG-based platforms, such as those from BrainScope Company, Inc., are emerging as rapid, noninvasive alternatives to traditional methods. The US market's growth is driven by its advanced healthcare infrastructure, high TBI prevalence, and a strong commitment to research and development.

Company Profiles

Key players in the North America Noninvasive TBI Diagnostic Equipment Market include Integra LifeSciences Holdings Corp, Medtronic Plc, Koninklijke Philips NV, GE HealthCare Technologies Inc, Natus Medical Inc, Nihon Kohden Corp, Elekta AB,

BrainScope Co Inc, Siemens Healthineers AG, and Luciole Medical AG. These companies are pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence.

documents, alongside primary research through interviews with industry stakeholders to validate findings and gain insights into market dynamics.

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