

## **Spinal Cord Stimulation Devices Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The Spinal Cord Stimulation Devices Market is projected to register a CAGR of 8.5% during the forecast period (2022-2027).

During the COVID 19 pandemic, the spinal cord stimulation devices market was adversely affected due to supply chain issues. Various research studies have provided insight into the impact of Covid on spinal cord stimulations. For instance, in August 2021, a research study published titled "The Impact of the COVID-19 Pandemic on Patients Awaiting Spinal Cord Stimulation Surgery in the United Kingdom: A Multi-Center Patient Survey" stated that spinal cord stimulation (SCS) is a recommended treatment for chronic refractory neuropathic pain. During the COVID-19 pandemic, elective procedures have been postponed indefinitely both to provide capacity to deal with the emergency caseload and to avoid exposure of elective patients to COVID-19. Hence, such studies provide insight into the negative impact of the pandemic on SCS.

Factors such as the rising prevalence of spinal disorders and chronic lower back pains coupled with the availability of medical reimbursements are key factors for the growth of the market. According to the National Spinal Cord Injury Statistical Center June 2021 report, it is estimated that about 296,000 people in the United States are living with a spinal cord injury. Of this population, about 78% of spinal cord injury cases occur in males, while the remaining 22% occur in females. The most common causes of SCI in this sample of 34,683 include auto accidents (32%), falls (23.1%), gunshot wounds (15.2%), motorcycle accidents (6.1%), and Diving (5.7%).

Similarly, in August 2021, a research study published titled "Spinal Cord Injuries" stated that globally between 250,000 and 500,000 patients each year suffer a spinal cord injury. Most of these cases are due to preventable causes such as violence and motor vehicle accidents. The same source stated that in the United States, there are approximately 17,000 new cases of spinal cord injuries (SCI) each year. Similarly, lower back pains are another factor in the growth of the market. For instance, in November

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

2021, a research study published titled "Interventions for the Management of Acute and Chronic Low Back Pain: Revision 2021" stated that low back pain (LBP) remains a musculoskeletal condition with an adverse societal impact. Globally, LBP is highly prevalent and a leading cause of disability. Hence, increasing spinal cord injury and lower back pain would increase the consumption of spinal cord stimulation devices and will increase the market growth.

The demand for spinal cord stimulators is increasing. For instance, in February 2022, Medtronic plc, one of the global leaders in healthcare technology, reported the first clinical procedure in India with the Intellis spinal cord stimulation (SCS) platform. It is one of the world's smallest SCS devices for the management of certain types of chronic intractable pain. Such use of technologically advanced products in developing countries would increase market growth in the upcoming future.

Reimbursement is another factor in the growth of the market. For instance, in the December 2021 report published titled "2022 National Average Payment Rate for Ambulatory Surgery Center (ASC)," the reimbursement cost for SCS Implant with Perc Leads (Insertion or replacement of spinal neurostimulator pulse generator or receiver, direct or inductive coupling) is USD 24,424. Similarly, the cost for laminectomy for implantation of neurostimulator electrodes, plate/paddle, and epidural is USD 17,146. Thus, the abovementioned factors will increase market growth in the upcoming future.

However, the risk associated with spinal cord stimulation devices would hinder the market growth.

### Spinal Cord Stimulation Devices Market Trends

#### Degenerative Disk Disease Segment is Expected to Hold a Significant Market Share Over the Forecast Period

Degenerative disc disease (DDD) is a condition where one or more discs in the spine deteriorate due to age, which results in back or neck pain. Factors such as increasing prevalence and product approvals are driving the growth of this segment.

Various research studies have been published on degenerative disc diseases. For instance, in February 2022, a research study published titled "Lumbar Degenerative Disk Disease" stated that most intervertebral disc degenerations are asymptomatic, making a true understanding of the prevalence difficult. The same source stated that, due to the lack of uniformity in the definitions of disc degenerations and disc herniations, the actual prevalence of the disease is difficult to review across multiple studies. In a meta-analysis of 20 studies evaluating the magnetic resonance imaging (MRI) of asymptomatic individuals, the reported disc abnormalities at any level were: 20% to 83% for a reduction in signal intensity, 10% to 81% for disc bulges, 3% to 63% for disc protrusion (versus 0% to 24% for disc extrusion), 3% to 56% for disc narrowing, and 6% to 56% with annular tears.

Similarly, another research published in August 2021, titled "Cervical Degenerative Disc Disease," stated that similar to the lumbar spine, cervical disc degeneration is a naturally occurring age-related phenomenon. The same source stated that the prevalence of cervical DDD increases with age regardless of the patient's symptomatology. A quarter of patients less than the age of 40 showed evidence of disk degeneration or narrowing at one level. This evidence was found in about 60% of patients in the same population who were greater than 40 years old. Hence, the prevalence of DDD is common and will increase in the upcoming future.

Clinical trials are another factor in the growth of the market. For instance, in February 2021, Mesoblast Limited, one of the global leaders in allogeneic cellular medicines for inflammatory diseases, received feedback from the United States Food & Drug Administration's (FDA) Office of Tissues and Advanced Therapies (OTAT) on the Phase III program of rexlomestrocet-L in patients with chronic low back pain (CLBP) due to degenerative disc disease (DDD) refractory to available therapies, including opioids. Such clinical trials increase the innovation in the market, which increases the growth of the market in the upcoming future. Hence, due to the abovementioned factors, the market is likely to grow in the future.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

North America is Expected to Dominate the Market Over the Forecast Period

The key factors propelling the market studied are increasing spinal cord injuries (SCI), product launches, and research studies in the region.

Various research studies have provided insight into the epidemiology of spinal cord injury (SCI) in the North American region. For instance, in 2021, a research study published titled "Development of the Canadian Spinal Cord Injury Best Practice (Can-SCIP) Guideline: Methods and overview" stated that the available SCI-specific clinical practice guidelines (CPG) address specific impairments, health conditions, or a segment of the care continuum, however, fail to address all the important clinical questions arising throughout an individual's care journey. To address this gap, an interprofessional panel of experts in SCI convened to develop the Canadian Spinal Cord Injury Best Practice (Can-SCIP) Guideline. Hence, standard guidelines could provide better methods to increase the treatment outcomes, which would increase the adoption of spinal cord stimulation devices due to a higher success rate.

Product launches are another factor in the growth of the region. In January 2021, Boston Scientific reported a limited market release of the WaveWriter Alpha portfolio of Spinal Cord Stimulator (SCS) systems. The unified portfolio of four MRI conditional, Bluetooth-enabled rechargeable, and non-rechargeable implantable pulse generators (IPGs) provides uncompromised personalization, and for the first time in SCS, Fast Acting Sub-perception Therapy (FAST) is designed to deliver profound paresthesia-free pain relief in minutes. Such product launches would increase the market growth in the region.

Product approval is another factor in the growth of the market. For instance, in July 2021, Food and Drug Administration (FDA) approved Senza Spinal Cord Stimulation (SCS) System. It is an implanted, rechargeable spinal cord stimulation system intended to treat long-term (chronic) pain in the trunk or limbs that is difficult to manage.

Hence, the abovementioned factors would increase market growth in the upcoming future.

#### Spinal Cord Stimulation Devices Market Competitor Analysis

The market is partially fragmented and consists of several major players. In terms of market share, a few of the major players are currently dominating the market. Some of the companies which are currently dominating the market are Abbott Laboratories, Inc., Boston Scientific Corporation, Saluda Medical Pty Ltd., Medtronic, and NEVRO CORP., among others.

Additional Benefits:

- <li> The market estimate (ME) sheet in Excel format </li>
- <li> 3 months of analyst support </li>

#### **Table of Contents:**

##### 1 INTRODUCTION

###### 1.1 Study Assumptions and Market Definition

###### 1.2 Scope of the Study

##### 2 RESEARCH METHODOLOGY

##### 3 EXECUTIVE SUMMARY

##### 4 MARKET DYNAMICS

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.1 Market Overview
- 4.2 Market Drivers
  - 4.2.1 Rising Burden of Spinal Disorders
  - 4.2.2 Availability of Medical Reimbursements
- 4.3 Market Restraints
  - 4.3.1 Risks Associated with Spinal Cord Stimulation Devices
- 4.4 Porter's Five Forces Analysis
  - 4.4.1 Threat of New Entrants
  - 4.4.2 Bargaining Power of Buyers/Consumers
  - 4.4.3 Bargaining Power of Suppliers
  - 4.4.4 Threat of Substitute Products
  - 4.4.5 Intensity of Competitive Rivalry

## 5 MARKET SEGMENTATION (Market Size by Value - USD million)

- 5.1 By Device Type
  - 5.1.1 Rechargeable
  - 5.1.2 Non-rechargeable
- 5.2 By Application
  - 5.2.1 Degenerative Disk Disease
  - 5.2.2 Failed Back Syndrome
  - 5.2.3 Unsuccessful Disk Surgery
  - 5.2.4 Others
- 5.3 Geography
  - 5.3.1 North America
    - 5.3.1.1 United States
    - 5.3.1.2 Canada
    - 5.3.1.3 Mexico
  - 5.3.2 Europe
    - 5.3.2.1 Germany
    - 5.3.2.2 United Kingdom
    - 5.3.2.3 France
    - 5.3.2.4 Italy
    - 5.3.2.5 Spain
    - 5.3.2.6 Rest of Europe
  - 5.3.3 Asia-Pacific
    - 5.3.3.1 China
    - 5.3.3.2 Japan
    - 5.3.3.3 India
    - 5.3.3.4 Australia
    - 5.3.3.5 South Korea
    - 5.3.3.6 Rest of Asia-Pacific
  - 5.3.4 Middle-East
    - 5.3.4.1 GCC
    - 5.3.4.2 South Africa
    - 5.3.4.3 Rest of Middle-East
  - 5.3.5 South America
    - 5.3.5.1 Brazil

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

5.3.5.2 Argentina

5.3.5.3 Rest of South America

## 6 COMPETITIVE LANDSCAPE

### 6.1 Company Profiles

6.1.1 Abbott Laboratories, Inc.

6.1.2 Beijing PINS Medical Co., Ltd.

6.1.3 Boston Scientific Corporation

6.1.4 Cirtec

6.1.5 Gimer Medical

6.1.6 Medtronic

6.1.7 Nalu Medical

6.1.8 NEVRO CORP.

6.1.9 Saluda Medical Pty Ltd.

6.1.10 Stimwave Technologies. Inc.

6.1.11 SYNAPSE BIOMEDICAL INC.

## 7 MARKET OPPORTUNITIES AND FUTURE TRENDS

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Spinal Cord Stimulation Devices Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-28"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

