

Report Information

More information from: <https://www.marketresearchfuture.com/reports/epilepsy-surgery-market-10676>

Epilepsy Surgery Market Research Report - Forecast till 2030

Report / Search Code: MRFR/HC/9192-CR

Publish Date: September, 2021

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Price	1-user PDF : \$ 4950.0	Site PDF : \$ 3250.0	Enterprise PDF : \$ 7250.0
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Description:

Global Epilepsy Surgery Market Overview

Epilepsy Surgery Market Size was valued at USD 1.1 billion in 2022. The Epilepsy Surgery market industry is projected to grow from USD 1.16 Billion in 2023 to USD 1.62 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 5.72% during the forecast period (2023 - 2030). Rising epilepsy prevalence and surgical procedure demand, increasing occurrences of brain damage brought on by traffic accidents, robot-assisted surgery development and. These are just a few of the market drivers that are driving the Epilepsy Surgery market.

Global Epilepsy Surgery Market Overview

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Epilepsy Surgery Market Trends

- **Increasing prevalence and Use of Advanced Imaging Technology to propel market growth**

Epilepsy is one of the most prevalent neurological illnesses worldwide, with an estimated 50 million individuals suffering from it, according to the WHO's fact sheets for 2019. People with epilepsy make up over 80% of the population in low- and middle-income nations. According to estimates, 70% of people with epilepsy might avoid seizures if their condition is adequately identified and treated. After a stroke, migraines, and Alzheimer's disease, epilepsy is the fourth most prevalent neurological condition. The US population's prevalence of active epilepsy was estimated at 1.2% (3.4 million) in 2015, according to the Centers for Disease Control and Prevention (CDC). At the University of Gondar Referral Hospital in Ethiopia, adult epileptic patients were evaluated in a research study published in 2018 on Sage Open Medicine. Seventy-nine adverse drug reactions were recorded, including exhaustion and gastrointestinal problems. Anticonvulsants, often antiepileptic medications, are a broad category of pharmaceuticals used to treat epileptic seizures.

Moreover, the growth in accidents and brain injuries, as well as the high rates of post-traumatic epilepsy (PTE) and post-traumatic seizure (PTS) incidence in patients with brain injuries, are the main factors propelling the epilepsy surgery industry. Thus, this factor is driving the Epilepsy Surgery market CAGR.

The epilepsy surgery market is being supported by the rising deployment of helper robots for precise and effective surgical planning & navigation. Due to much-reduced complication rates, better patient outcomes, and shorter operation times, patients choose minimally invasive epilepsy surgery. To treat epileptic diseases, epilepsy surgery involves stereo electroencephalography (SEEG), biopsy, thermal ablation of seizure foci or tumors, and deep brain stimulation (DBS). Additionally, computer-guided robotic arms derived from the automobile sector for neurosurgery applications were used before specialized stereotactic frameworks. To create a basic strategy for SEEG, neurologists and neurosurgeons work together under the direction of a noninvasive presurgical epilepsy workup. More than 150 recording locations may be available from a conventional montage of 10 electrodes. There have been few reports of robotic stereotactic aid in pediatric neurosurgery. Thus, it is anticipated that this aspect will accelerate the Epilepsy Surgery market revenue ly.

Epilepsy Surgery Market Segment Insights

Epilepsy Surgery Procedure Type Insights

The Epilepsy Surgery market segmentation, based on Procedure type, includes Resective Surgery and Laser Interstitial Thermal Therapy (LITT). The Laser Interstitial Thermal Therapy (LITT) segment held the majority share in 2022 in the Epilepsy Surgery market data. A minimally invasive method called LITT (Laser Interstitial Thermal Therapy) is used to treat drug-resistant epilepsy and seizures

that don't respond to medication. Some persons with focal seizures—seizures that start in only one spot on the brain—may benefit from LITT. Three to four hours are typically needed for the LITT treatment. The advent of MRI-guided LITT devices has made it possible to ablate neurological soft tissue.

Figure 1 Epilepsy Surgery Market by Procedure type, 2022 & 2030 (USD Billion)
Epilepsy Surgery Market by Procedure type, 2022 & 2030

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Epilepsy Surgery End-user Insights

The Epilepsy Surgery market segmentation, based on End-user, includes Hospitals & Clinics and Specialty Centers. The Hospitals & Clinics segment dominated the market growth in 2022 and is projected to be the faster-growing segment during the forecast period, 2022-2030. This rise is mostly attributable to an increase in the number of persons getting epilepsy surgery and acquiring an epilepsy diagnosis. Because hospitals offer comprehensive and cutting-edge therapies, many choose to receive their care there. Patients with epilepsy are treated at clinics and other medical care facilities.

Epilepsy Surgery Regional Insights

By region, the study provides market insights into North America, Europe, Asia-Pacific and the Rest of the World. The North America Epilepsy Surgery market accounted for USD 0.50 billion in 2022 with a share of around 45.80% and is expected to exhibit a significant CAGR growth during the study period. Due to various elements, including the availability of well-established healthcare facilities, the high prevalence of neurological illnesses, and the rising incidence of epilepsy, the Americas dominated the epilepsy surgery market. The US. and Canada are the major countries of North America. A central nervous system (CNS) illness, which produces seizures and is the fourth most prevalent neurological disease, is believed to affect approximately 150,000 Americans. The incidence rate is also highest in small children under two and individuals aged 65 and over. Epilepsy is becoming more common in the Americas. Seizures afflict around 300,000 Canadians, and one in every 2,000 persons is diagnosed with epilepsy yearly. In the Canadian population, neurological illnesses are also among the top causes of disability.

Further, the major countries studied in the Epilepsy Surgery market report are The U.S., Canada, Germany, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 2 EPILEPSY SURGERY MARKET SHARE BY REGION 2022 (%)
EPILEPSY SURGERY MARKET SHARE BY REGION 2022

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

With increasing investment in research & development, the production of successful epilepsy medications, and a high prevalence of epilepsy, Europe Epilepsy Surgery market has also evolved as a prominent market for epilepsy surgery. The region has considerable growth potential that would help with the expansion of the epilepsy surgery market in the coming years. According to the 2020 EU Industrial Research & Development Scoreboard, companies in the European Union have increased their investment in research & development. In 2019, European companies invested 5.6% more in R&D, compared to 4.7% in 2018. The production of successful medications to cure epilepsy in the region is increasing. Moreover, the UK Epilepsy Surgery market held the largest market share, and the Germany Epilepsy Surgery market was the fastest-growing market in the region.

The Asia-Pacific Epilepsy Surgery market offers lucrative opportunities for players, owing to a large senior population, governmental initiatives to improve the healthcare sector, increased research & development activities, and increased epilepsy incidence in the region. The prevalence of epilepsy in the elderly population is very high. It is estimated that the prevalence of epilepsy is 10.8 in 1,000. According to WHO, the population of the South-East Asia region is aging rapidly, and the proportion of people aged 60 or above was 9.7% in 2017. It is also estimated that the geriatric population will increase to 13.7% and 20.3% by 2030 and by 2050, respectively. Further, the China Epilepsy Surgery market held the largest market share, and the India Epilepsy Surgery market was the fastest-growing market in the region.

Epilepsy Surgery Key Market Players & Competitive Insights

Major industry companies are investing a lot of money in R&D to expand their product offerings, which will spur further market expansion for Epilepsy Surgery. With significant industry changes, including new product launches, mergers and acquisitions, contractual agreements, higher investments, and collaboration with other organizations, market developments are also undertaking various strategic activities to expand their presence. To grow and remain in a market that is becoming more and more competitive, Epilepsy Surgery industry competitors must provide affordable products.

Manufacturing locally to cut operational costs is one of the main business methods producers use in the Epilepsy Surgery industry to benefit customers and increase the market sector. The Epilepsy Surgery industry has recently given medicine some of the most important advantages. In the Epilepsy Surgery market, major players such as Stryker (US), Zimmer Biomet Holdings Inc. (US), Auris Health Inc. (Hansen Medical Inc.) (US), Intuitive Surgical (US), Medtronic Plc (Mazor Robotics) (Ireland) In, Cephalon Inc (US), CMR Surgical (UK), Natus Medical Incorporated (US), Livanova Plc

(UK), Monteris Medical (US) Company.

An American manufacturer of medical equipment is Medtronic plc. As a result of its acquisition of Covidien, an Irish corporation, the company has its operational and executive offices in Minneapolis, Minnesota, and its legal headquarters in Ireland. To treat medication-resistant epilepsy, Medtronic (Ireland) introduced its Deep Brain Stimulation system in the US in February 2019. For individuals with epilepsy who do not react to the medicine, the DBS offers a crucial surgical therapy alternative.

The da Vinci Surgical System is one of the robotic systems developed, produced, and marketed by Intuitive Surgical, Inc., an American company. These tools are intended to enhance clinical outcomes for patients through minimally invasive surgery. To create and distribute clinical video management and analytics tools for various surgical specialties, Intuitive Surgical (US) bought Orpheus Medical in February 2020. Intuitive Surgical can expand its integrated informatics platform thanks to this purchase.

Key Companies in the Epilepsy Surgery market include

- Stryker (US)
- Zimmer Biomet Holdings Inc. (US)
- Auris Health
- Inc. (Hansen Medical Inc.) (US)
- Intuitive Surgical (US)
- Medtronic Plc (Mazor Robotics) (Ireland)
- Cephalon Inc (US)
- CMR Surgical (UK)
- Natus Medical Incorporated (US)
- Livanova Plc (UK)
- Monteris Medical (US)

Epilepsy Surgery Industry Developments

- **August 2021** Due to a contract between Yuyu Pharma and Novartis Korea, Yuyu Pharma now has the exclusive rights to distribute three prescription pharmaceuticals, including Tegretol, a drug that contains the substance carbamazepine, which is used to treat conditions like epilepsy.
- **February 2021** Koninklijke Philips N.V. acquired BioTelemetry, Inc., a top remote diagnostics and monitoring supplier.
- **September 2020** The Clinique du Parc Hospital in Saint-Etienne, France, hosted the Versius Surgical Robotic System debut by CMR Surgical (UK). France is the third-biggest robotics market in the world and the largest in Europe.
- **July 2020** FDA approval was granted to Monteris Medical (US) for the NeuroBlate Fusion-S Software. Incomparable imaging made possible by NeuroBlate Fusion-S Software allows neurosurgeons to remove tumors and epileptic foci from the brain.
- **February 2019** The ROSA One Brain Application, a robotic surgical navigation and positioning system for neurosurgery operations, has been approved by the US Food and Drug Administration (FDA).

Epilepsy Surgery Market Segmentation

Epilepsy Surgery Procedure Type Outlook (USD Million, 2018-2030)

- Resective Surgery
- Laser Interstitial Thermal Therapy (LITT)

Epilepsy Surgery End User Outlook (USD Million, 2018-2030)

- Hospitals & Clinics
- Specialty Centers

Epilepsy Surgery Regional Outlook (USD Billion, 2018-2030)

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific
- Rest of the World
 - Middle East
 - Africa
 - Latin America

Table of Content:

Contents

TABLE OF CONTENTS

1 EXECUTIVE SUMMARY

2 MARKET INTRODUCTION

2.1 SCOPE OF THE STUDY

2.2 RESEARCH OBJECTIVE

2.3 MARKET STRUCTURE

2.4 ASSUMPTIONS & LIMITATIONS

3 RESEARCH METHODOLOGY

3.1 DATA MINING

3.2 SECONDARY RESEARCH

3.3 PRIMARY RESEARCH

3.4 BREAKDOWN OF PRIMARY RESPONDENTS

3.5 FORECASTING TECHNIQUES

3.6 RESEARCH METHODOLOGY FOR MARKET SIZE ESTIMATION

3.6.1 BOTTOM-UP APPROACH

3.6.2 TOP-DOWN APPROACH

3.7 DATA TRIANGULATION

3.8 VALIDATION

4 MARKET DYNAMICS

4.1 OVERVIEW

- 4.2 DRIVERS
 - 4.2.1 INCREASING PREVALENCE OF EPILEPSY AND DEMAND FOR SURGICAL PROCEDURES
 - 4.2.2 RISING NUMBER OF CASES OF BRAIN INJURIES DUE TO ROAD ACCIDENTS
 - 4.2.3 ADVANCEMENT AND ADOPTION OF ROBOT-ASSISTED SURGERY
- 4.3 RESTRAINT
 - 4.3.1 STRINGENT GOVERNMENT REGULATIONS AND COMPLICATIONS ASSOCIATED WITH SURGERY
- 4.4 OPPORTUNITY
 - 4.4.1 COLLABORATION WITH RESEARCH INSTITUTES FOR MARKET ENTRANTS TO ACCESS GLOBAL MARKETS
- 5 MARKET FACTOR ANALYSIS
 - 5.1 VALUE CHAIN ANALYSIS
 - 5.1.1 R&D
 - 5.1.2 MANUFACTURING
 - 5.1.3 DISTRIBUTION
 - 5.1.4 MARKETING & SALES
 - 5.2 PORTER'S FIVE FORCES MODEL
 - 5.2.1 BARGAINING POWER OF BUYERS
 - 5.2.2 BARGAINING POWER OF SUPPLIERS
 - 5.2.3 THREAT OF NEW ENTRANTS
 - 5.2.4 THREAT OF SUBSTITUTES
 - 5.2.5 INTENSITY OF RIVALRY
 - 5.3 IMPACT OF COVID-19
 - 5.3.1 IMPACT ON SUPPLY CHAIN
 - 5.3.2 IMPACT ON DEMAND
 - 5.3.3 AVAILABILITY AND ACCESS TO HEALTHCARE FACILITIES
 - 5.3.4 IMPACT ON REVENUE AND STRATEGIC DECISIONS BY COMPANIES
- 6 GLOBAL EPILEPSY SURGERY MARKET BY PROCEDURE TYPE
 - 6.1 OVERVIEW
 - 6.2 RESECTIVE SURGERY
 - 6.3 LASER INTERSTITIAL THERMAL THERAPY (LITT)
 - 6.4 OTHERS
- 7 GLOBAL EPILEPSY SURGERY MARKET BY END USER
 - 7.1 OVERVIEW
 - 7.2 HOSPITALS & CLINICS
 - 7.3 SPECIALTY CENTERS
 - 7.4 OTHERS
- 8 GLOBAL EPILEPSY SURGERY MARKET, BY REGION
 - 8.1 OVERVIEW
 - 8.2 AMERICAS
 - 8.2.1 NORTH AMERICA
 - 8.2.1.1 US
 - 8.2.1.2 CANADA
 - 8.2.2 LATIN AMERICA
 - 8.3 EUROPE
 - 8.3.1 WESTERN EUROPE
 - 8.3.1.1 GERMANY
 - 8.3.1.2 UK
 - 8.3.1.3 FRANCE
 - 8.3.1.4 ITALY
 - 8.3.1.5 SPAIN
 - 8.3.1.6 REST OF WESTERN EUROPE
 - 8.3.2 EASTERN EUROPE
 - 8.4 ASIA PACIFIC
 - 8.4.1 CHINA
 - 8.4.2 JAPAN
 - 8.4.3 INDIA
 - 8.4.4 SOUTH KOREA
 - 8.4.5 AUSTRALIA
 - 8.4.6 REST OF ASIA PACIFIC
 - 8.5 MIDDLE EAST & AFRICA
 - 8.5.1 MIDDLE EAST
 - 8.5.2 AFRICA
- 9 COMPETITIVE LANDSCAPE
 - 9.1 OVERVIEW
 - 9.2 COMPETITIVE BENCHMARKING
 - 9.3 MAJOR GROWTH STRATEGY IN THE GLOBAL EPILEPSY SURGERY MARKET
 - 9.4 THE LEADING PLAYER IN TERMS OF THE NUMBER OF DEVELOPMENTS IN THE GLOBAL EPILEPSY SURGERY MARKET
 - 9.5 KEY DEVELOPMENT ANALYSIS
 - 9.6 KEY DEVELOPMENTS & GROWTH STRATEGIES
 - 9.6.1 PRODUCT LAUNCH/PRODUCT APPROVAL
 - 9.6.2 MERGER/ACQUISITION
 - 9.7 FINANCIAL MATRIX
 - 9.7.1 SALES (USD MILLION), 2020
 - 9.7.2 RESEARCH & DEVELOPMENT EXPENDITURE (USD MILLION), 2020
- 10 COMPANY PROFILES
 - 10.1 STRYKER
 - 10.1.1 COMPANY OVERVIEW
 - 10.1.2 FINANCIAL OVERVIEW
 - 10.1.3 PRODUCTS/SERVICES OFFERED
 - 10.1.4 KEY DEVELOPMENTS
 - 10.1.5 SWOT ANALYSIS
 - 10.1.6 KEY STRATEGIES
 - 10.2 ZIMMER BIOMET HOLDINGS INC.
 - 10.2.1 COMPANY OVERVIEWS
 - 10.2.2 FINANCIAL OVERVIEW
 - 10.2.3 PRODUCTS/SERVICES OFFERED
 - 10.2.4 KEY DEVELOPMENTS
 - 10.2.5 SWOT ANALYSIS
 - 10.2.6 KEY STRATEGIES
 - 10.3 AURIS HEALTH, INC. (HANSEN MEDICAL, INC.)
 - 10.3.1 COMPANY OVERVIEW
 - 10.3.2 FINANCIAL OVERVIEW

10.3.3	PRODUCTS/SERVICES OFFERED
10.3.4	KEY DEVELOPMENTS
10.3.5	SWOT ANALYSIS
10.3.6	KEY STRATEGIES
10.4	INTUITIVE SURGICAL
10.4.1	COMPANY OVERVIEW
10.4.2	FINANCIAL OVERVIEW
10.4.3	PRODUCTS/SERVICES OFFERED
10.4.4	KEY DEVELOPMENTS
10.4.5	SWOT ANALYSIS
10.4.6	KEY STRATEGIES
10.5	MEDTRONIC PLC (MAZOR ROBOTICS)
10.5.1	COMPANY OVERVIEW
10.5.2	FINANCIAL OVERVIEW
10.5.3	PRODUCTS/SERVICES OFFERED
10.5.4	KEY DEVELOPMENTS
10.5.5	SWOT ANALYSIS
10.5.6	KEY STRATEGIES
10.6.4	KEY DEVELOPMENTS
10.7	CMR SURGICAL
10.7.1	COMPANY OVERVIEW
10.7.2	FINANCIAL OVERVIEW
10.7.3	PRODUCTS/SERVICES OFFERED
10.7.4	KEY DEVELOPMENTS
10.7.5	SWOT ANALYSIS
10.7.6	KEY STRATEGIES
10.8	NATUS MEDICAL INCORPORATED
10.8.1	COMPANY OVERVIEW
10.8.2	FINANCIAL OVERVIEW
10.8.3	PRODUCTS OFFERED
10.8.4	KEY DEVELOPMENTS
10.8.5	SWOT ANALYSIS
10.8.6	KEY STRATEGIES
10.9	LIVANOVA PLC
10.9.1	COMPANY OVERVIEW
10.9.2	FINANCIAL OVERVIEW
10.9.3	PRODUCTS OFFERED
10.9.4	KEY DEVELOPMENTS
10.9.5	SWOT ANALYSIS
10.9.6	KEY STRATEGIES
10.10	MONTERIS MEDICAL
10.10.1	COMPANY OVERVIEW
10.10.2	FINANCIAL OVERVIEW
10.10.3	PRODUCTS/SERVICES OFFERED
10.10.4	KEY DEVELOPMENTS
10.10.5	SWOT ANALYSIS
10.10.6	KEY STRATEGIES
11	APPENDIX
11.1	REFERENCES
11.2	RELATED REPORTS

LIST OF TABLES

TABLE 1	LIST OF ASSUMPTIONS & LIMITATIONS
TABLE 2	PRIMARY INTERVIEWS AND INFORMATION GATHERING PROCESS
TABLE 3	GLOBAL: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 4	GLOBAL: EPILEPSY SURGERY MARKET, BY RESECTIVE SURGERY, 2023-2030 (USD MILLION)
TABLE 5	GLOBAL: EPILEPSY SURGERY MARKET, BY LASER INTERSTITIAL THERMAL THERAPY (LITT), 2023-2030 (USD MILLION)
TABLE 6	GLOBAL: EPILEPSY SURGERY MARKET, BY OTHERS, 2023-2030 (USD MILLION)
TABLE 7	GLOBAL: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 8	GLOBAL: EPILEPSY SURGERY MARKET, BY HOSPITALS & CLINICS, 2023-2030 (USD MILLION)
TABLE 9	GLOBAL: EPILEPSY SURGERY MARKET, BY SPECIALTY CENTERS, 2023-2030 (USD MILLION)
TABLE 10	GLOBAL: EPILEPSY SURGERY MARKET, BY OTHERS, 2023-2030 (USD MILLION)
TABLE 11	GLOBAL: EPILEPSY SURGERY MARKET, BY REGION, 2023-2030 (USD MILLION)
TABLE 12	AMERICAS EPILEPSY SURGERY MARKET, BY REGION, 2023-2030 (USD MILLION)
TABLE 13	AMERICAS EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 14	AMERICAS EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 15	NORTH AMERICA EPILEPSY SURGERY MARKET, BY COUNTRY, 2023-2030 (USD MILLION)
TABLE 16	NORTH AMERICA EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 17	NORTH AMERICA EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 18	US EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 19	US EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 20	CANADA EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 21	CANADA EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 22	LATIN AMERICA EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 23	LATIN AMERICA EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 24	EUROPE EPILEPSY SURGERY MARKET, BY REGION, 2023-2030 (USD MILLION)
TABLE 25	EUROPE EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 26	EUROPE EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 27	WESTERN EUROPE EPILEPSY SURGERY MARKET, BY COUNTRY, 2023-2030 (USD MILLION)
TABLE 28	WESTERN EUROPE EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 29	AMERICAS EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 30	GERMANY EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 31	GERMANY EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 32	UK EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 33	UK EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 34	FRANCE EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 35	FRANCE EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 36	ITALY EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 37	ITALY EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 38	SPAIN EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)

TABLE 39 SPAIN EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 40 REST OF WESTERN EUROPE EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 41 REST OF WESTERN EUROPE EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 42 EASTERN EUROPE EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 43 EASTERN EUROPE EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 44 ASIA PACIFIC: EPILEPSY SURGERY MARKET, BY COUNTRY, 2023-2030 (USD MILLION)
TABLE 45 ASIA-PACIFIC: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 46 ASIA-PACIFIC: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 47 CHINA: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 48 CHINA: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 49 JAPAN: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 50 JAPAN: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 51 INDIA: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 52 INDIA: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 53 SOUTH KOREA: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 54 SOUTH KOREA: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 55 AUSTRALIA: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 56 AUSTRALIA: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 57 REST OF ASIA PACIFIC: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 58 REST OF ASIA PACIFIC: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 59 MIDDLE EAST & AFRICA: EPILEPSY SURGERY MARKET, BY COUNTRY, 2023-2030 (USD MILLION)
TABLE 60 MIDDLE EAST & AFRICA: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 61 MIDDLE EAST & AFRICA: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 62 MIDDLE EAST: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 63 MIDDLE EAST: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 64 AFRICA: EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
TABLE 65 AFRICA: EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
TABLE 66 MAJOR PLAYERS IN THE GLOBAL EPILEPSY SURGERY MARKET
TABLE 67 MOST ACTIVE PLAYER IN THE GLOBAL EPILEPSY SURGERY MARKET
TABLE 68 PRODUCT LAUNCH/PRODUCT APPROVAL
TABLE 69 MERGER/ACQUISITION
TABLE 70 STRYKER: PRODUCTS/SERVICES OFFERED
TABLE 71 ZIMMER BIOMET HOLDINGS INC.: PRODUCTS/SERVICES OFFERED
TABLE 72 ZIMMER BIOMET HOLDINGS INC.: KEY DEVELOPMENTS
TABLE 73 AURIS HEALTH, INC. (HANSEN MEDICAL, INC.): PRODUCTS/SERVICES OFFERED
TABLE 74 AURIS HEALTH, INC. (HANSEN MEDICAL, INC.): KEY DEVELOPMENTS
TABLE 75 INTUITIVE SURGICAL: PRODUCTS/SERVICES OFFERED
TABLE 76 INTUITIVE SURGICAL: KEY DEVELOPMENTS
TABLE 77 MEDTRONIC PLC: PRODUCTS/SERVICES OFFERED
TABLE 78 MEDTRONIC PLC: KEY DEVELOPMENTS
TABLE 79 CEPHALON, INC.: PRODUCTS/SERVICES OFFERED
TABLE 80 CMR SURGICAL: PRODUCTS/SERVICES OFFERED
TABLE 81 CMR SURGICAL: KEY DEVELOPMENTS
TABLE 82 NATUS MEDICAL INCORPORATED: PRODUCTS OFFERED
TABLE 83 LIVANOVA PLC: PRODUCTS OFFERED
TABLE 84 MONTERIS MEDICAL: PRODUCTS/SERVICES OFFERED
TABLE 85 MONTERIS MEDICAL: KEY DEVELOPMENTS
LIST OF FIGURES
FIGURE 1 MARKET SYNOPSIS
FIGURE 2 MARKET STRUCTURE: GLOBAL EPILEPSY SURGERY MARKET
FIGURE 3 BOTTOM-UP AND TOP-DOWN APPROACHES
FIGURE 4 MARKET DYNAMICS: GLOBAL EPILEPSY SURGERY MARKET
FIGURE 5 DRIVERS: IMPACT ANALYSIS
FIGURE 6 RESTRAINT: IMPACT ANALYSIS
FIGURE 7 VALUE CHAIN: GLOBAL EPILEPSY SURGERY MARKET
FIGURE 8 PORTER'S FIVE FORCES ANALYSIS: GLOBAL EPILEPSY SURGERY MARKET
FIGURE 9 GLOBAL EPILEPSY SURGERY MARKET, BY PROCEDURE TYPE, 2023-2030 (USD MILLION)
FIGURE 10 GLOBAL EPILEPSY SURGERY MARKET, BY END USER, 2023-2030 (USD MILLION)
FIGURE 11 GLOBAL: EPILEPSY SURGERY MARKET, BY REGION 2023-2030 (USD MILLION)
FIGURE 12 GLOBAL: EPILEPSY SURGERY MARKET SHARE (%), BY REGION, 2020
FIGURE 13 AMERICAS: EPILEPSY SURGERY MARKET SHARE (%), BY REGION, 2020
FIGURE 14 NORTH AMERICA: EPILEPSY SURGERY MARKET SHARE (%), BY COUNTRY, 2020
FIGURE 15 EUROPE: EPILEPSY SURGERY MARKET SHARE (%), BY REGION, 2020
FIGURE 16 WESTERN EUROPE: EPILEPSY SURGERY MARKET SHARE (%), BY COUNTRY, 2020
FIGURE 17 ASIA PACIFIC: EPILEPSY SURGERY MARKET SHARE (%), BY COUNTRY, 2020
FIGURE 18 MIDDLE EAST & AFRICA: EPILEPSY SURGERY MARKET SHARE (%), BY COUNTRY, 2020
FIGURE 19 BENCHMARKING OF MAJOR COMPETITORS
FIGURE 20 MAJOR STRATEGY ADOPTED BY KEY PLAYERS IN THE GLOBAL EPILEPSY SURGERY MARKET
FIGURE 21 GLOBAL EPILEPSY SURGERY MARKET: COMPETITIVE LANDSCAPE
FIGURE 22 SALES (USD MILLION), 2020
FIGURE 23 RESEARCH & DEVELOPMENT EXPENDITURE (USD MILLION), 2020
FIGURE 24 STRYKER: FINANCIAL OVERVIEW SNAPSHOT
FIGURE 25 STRYKER: SWOT ANALYSIS
FIGURE 26 ZIMMER BIOMET HOLDINGS INC.: FINANCIAL OVERVIEW SNAPSHOT
FIGURE 27 ZIMMER BIOMET HOLDINGS INC.: SWOT ANALYSIS
FIGURE 28 AURIS HEALTH, INC. (HANSEN MEDICAL, INC.): SWOT ANALYSIS
FIGURE 29 INTUITIVE SURGICAL: FINANCIAL OVERVIEW SNAPSHOT
FIGURE 30 INTUITIVE SURGICAL: SWOT ANALYSIS
FIGURE 31 MEDTRONIC PLC: FINANCIAL OVERVIEW SNAPSHOT
FIGURE 32 MEDTRONIC PLC: SWOT ANALYSIS
FIGURE 34 CMR SURGICAL: SWOT ANALYSIS
FIGURE 35 NATUS MEDICAL INCORPORATED: FINANCIAL OVERVIEW SNAPSHOT
FIGURE 36 NATUS MEDICAL INCORPORATED: SWOT ANALYSIS
FIGURE 37 LIVANOVA PLC: FINANCIAL OVERVIEW SNAPSHOT
FIGURE 38 LIVANOVA PLC: SWOT ANALYSIS
FIGURE 39 MONTERIS MEDICAL SWOT ANALYSIS

