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2 Introduction

Cerebrovascular disease is a major global public health and economic problem that is associated with high mortality and morbidity. Neurovascular interventions including embolization, revascularization, and mechanical thrombectomy devices have been adopted in clinical practice to address the challenges of conventional therapies, as well as improve outcomes and patient prognosis. Endovascular therapy including coil embolization, stent/balloon-assisted coiling, and flow diversion techniques can be used to treat ruptured intracranial aneurysms and unruptured intracranial aneurysms (UIAs). Emerging technologies such as flow diveters have been used to treat challenging intracranial aneurysms such as wide-neck, large, and giant aneurysms. Embolization with liquid embolic agents can be used as an adjunct or primary therapy for intracranial arteriovenous malformation (AVM) and dural arteriovenous fistula (DAVF) treatment. Revascularization of occluded/narrow intracranial and extracranial arteries can be performed using minimally invasive devices such as stents and angioplasty balloon catheters. However, the number of revascularization procedures performed has decreased from previous years due to a lack of clinical data demonstrating the benefits of stenting compared with surgical and medical therapy for treating patients with carotid artery disease and intracranial atherosclerotic disease (ICAD).

For patients with acute ischemic stroke (AIS), mechanical thrombectomy devices including stent retrievers and proximal aspiration thrombectomy devices have emerged as viable and effective alternative solutions to conventional chemical thrombolysis. Access devices such as microcatheters, guide catheters, and guidewires enable the delivery of embolization, revascularization, and thrombectomy devices to the target site.

This report focuses on the global neurovascular interventions market in the 10 major markets (10MM) (US, France, Germany, Italy, Spain, UK, Japan, China, India, and Brazil) for treating cerebrovascular disease including intracranial aneurysms and AVMs, atherosclerotic disease, and AIS. The global neurovascular interventions market is determined for the 10MM, where the key companies shaping and driving the global market are analyzed. The report provides insight into the competitive neurointerventional devices landscape, including new companies entering the market and pipeline products in development.
Introduction

2.1 Catalyst

Modern developments in endovascular interventions have led to a paradigm shift in the treatment of cerebrovascular disease towards endovascular therapy. Technological and scientific advancements in the field of neurovascular interventions have expanded the potential for therapeutic applications. Neurovascular interventions using embolization, revascularization, and mechanical thrombectomy devices can provide sustained clinical outcomes and address the unmet needs of the market. Management of patients with intracranial aneurysms and AVMs, atherosclerotic disease, and stroke is complex and challenging, reiterating the need for effective therapies. Conventional therapies used to treat patients with cerebrovascular disease do not translate to improved, long-term clinical outcomes.

Complex aneurysm morphologies and sizes such as wide-neck, wide-neck bifurcation, and large and giant aneurysms are a challenging subset of lesions to treat. These lesions are difficult to treat due to high recanalization rates and severe periprocedural complications. In addition, there is a lack of an optimal treatment strategy for treating intracranial unruptured aneurysms. Intracranial AVMs are characterized by a complex angioarchitecture, where there is currently no single treatment that has been proven to be effective. Although low profile stent and balloon systems have been developed for the revascularization of vessels characterized by atherosclerosis, a lack of clinical data demonstrating superior performance to surgical and medical therapy as well as post-procedural complications have hindered widespread adoption. Also, the management of AIS is challenging due to a lack of effective treatment options and the unpredictability of outcomes. Intravenous (IV) thrombolysis is the first line of therapy for eligible patients with AIS. However, low complete recanalization rates and an increased risk of hemorrhagic complications warrant the need for alternative therapies.

The challenges and clinical unmet needs of treating intracranial aneurysms and AVM, atherosclerotic disease, and stroke reiterate the need for therapies that provide long-term outcomes and increase patient safety. As more long-term clinical data that demonstrate the superior therapeutic benefits and appropriate reimbursement become available, and the cost of devices decrease, the adoption of innovative neurointerventional devices by the medical community will increase in the future. This report looks at the current neurovascular interventions market for cerebrovascular disease and evaluates the adoption and opportunities for this technology in the 10MM.
Appendix

6.8 About MediPoint

MediPoint is the flagship product for GlobalData’s Medical team. Each MediPoint report is built from the ground up by our team of healthcare analysts in the US and UK. Each report includes input from experienced physicians and leading KOLs. Running throughout each report in the series, “What Physicians Think” quotes provide a unique insight into how healthcare professionals are reacting to events within the industry, and what their responses could mean for industry strategists.

6.9 About GlobalData

GlobalData is a leading global provider of business intelligence in the healthcare industry. GlobalData provides its clients with up-to-date information and analysis on the latest developments in drug research, disease analysis, and clinical research and development. Our integrated business intelligence solutions include a range of interactive online databases, analytical tools, reports, and forecasts. Our analysis is supported by a 24/7 client support and analyst team. GlobalData has offices in New York, San Francisco, Boston, London, India, Korea, Tokyo, and Singapore.

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