



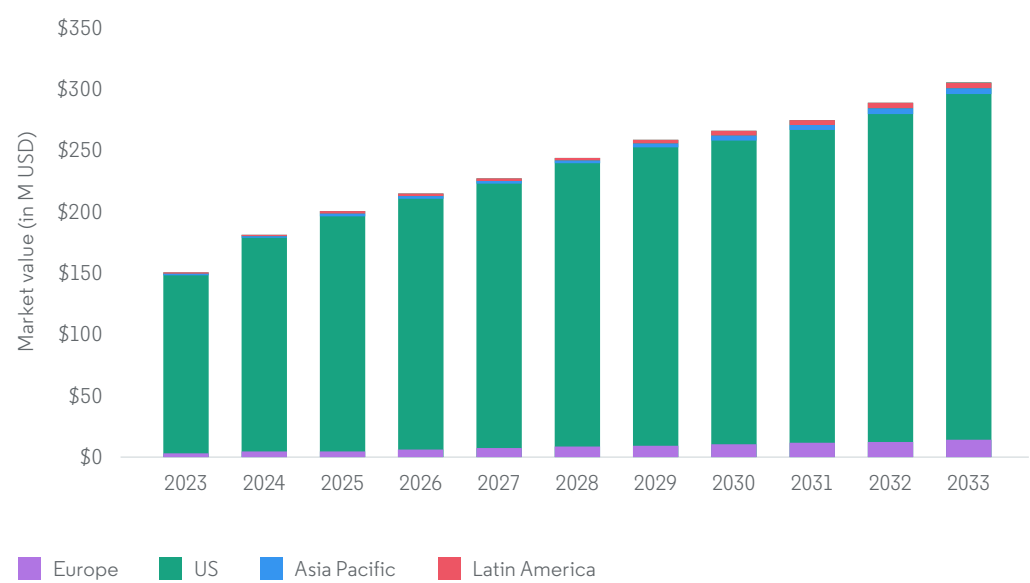
Chronic Subdural Hematoma Embolization Devices



Clarivate™

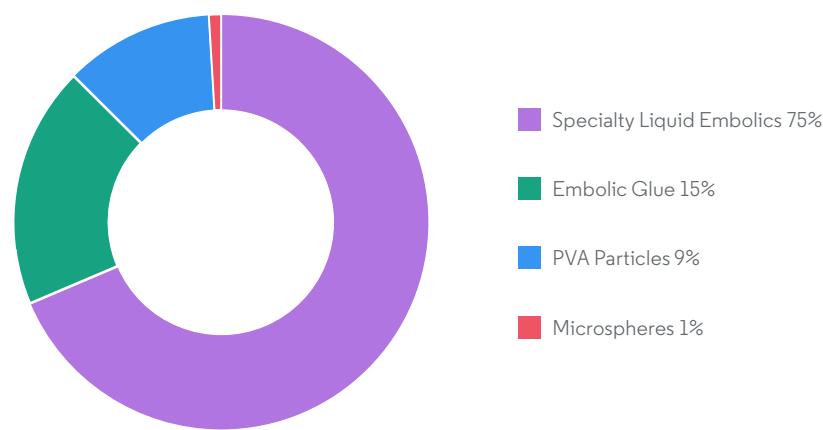
Global chronic subdural hematoma (cSDH) embolization device market landscape

Figure 1: Global cSDH embolization device market.



Source: Clarivate

Figure 2: cSDH embolization procedures, by product type, 2023.



Source: Clarivate

Insights from SNVICON* 2024



01. Major clinical trials impacting the market

- EMBOLISE, STEM, MAGIC-MT: Positive preliminary results have supported embolization for cSDH treatment.
- MEMBRANE: Results are anticipated by February 2025.



02. Key trends

- Developed markets will see more uptake of devices like specialty liquid embolics, whereas cost-conscious markets will see more uptake of embolic glues and PVA particles.
- In developed markets, embolization in cSDH patients is used along with surgery to reduce recurrence rates, whereas in cost-conscious markets, cSDH embolization is often used in cases where surgery cannot be performed, thus limiting the market.

*The 7th annual congress of society of neuro vascular interventions.

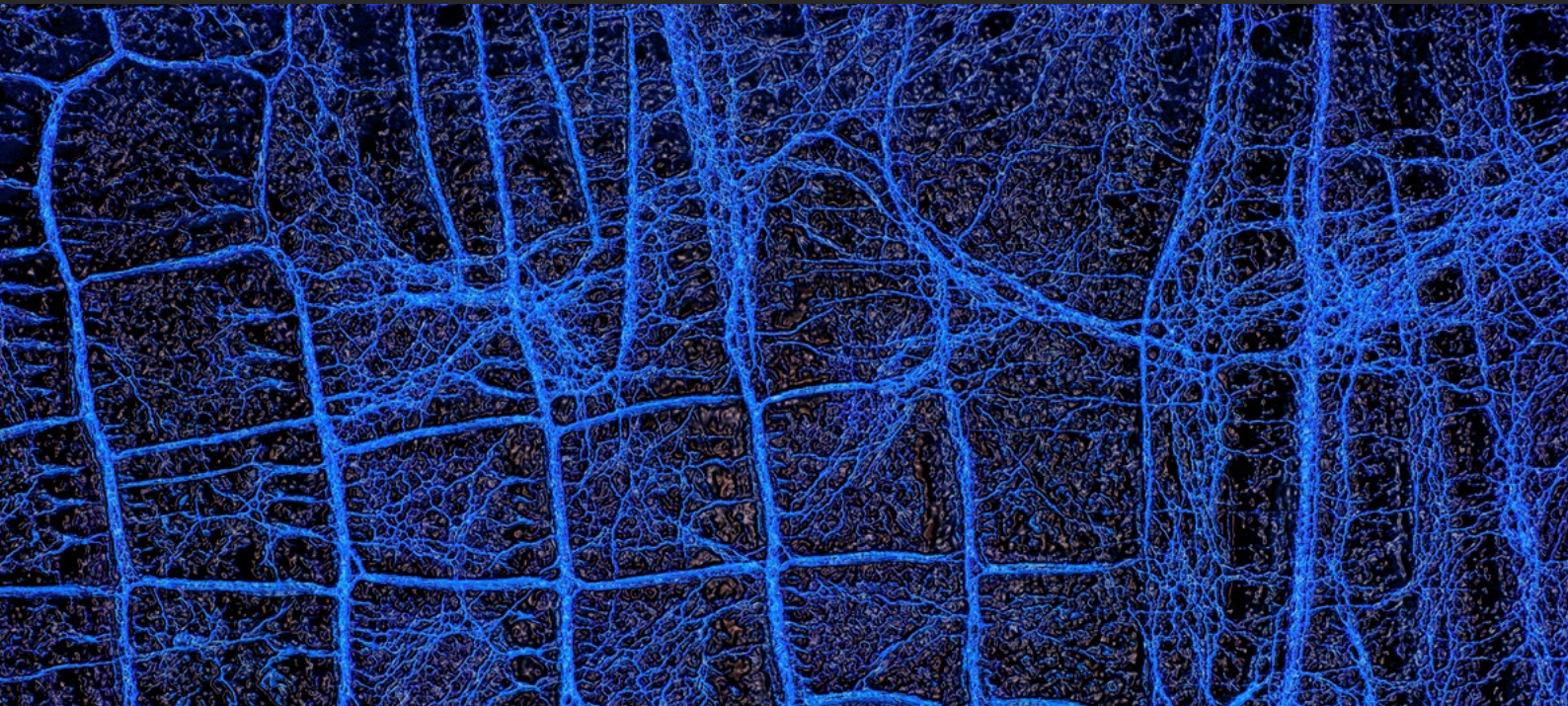


Table 1: Insights from SNVICON* 2024.

Manufacturers	Key trial names and details
Medtronic	EMBOLISE, MAGIC-MT: Onyx Liquid Embolic System Preliminary trial results are available
Balt	STEM: Squid Liquid Embolic Device Preliminary trial results are available
CERENOVUS	MEMBRANE: TruFill n-BCA Liquid Embolic System The trial is ongoing and expected to be completed by 2025

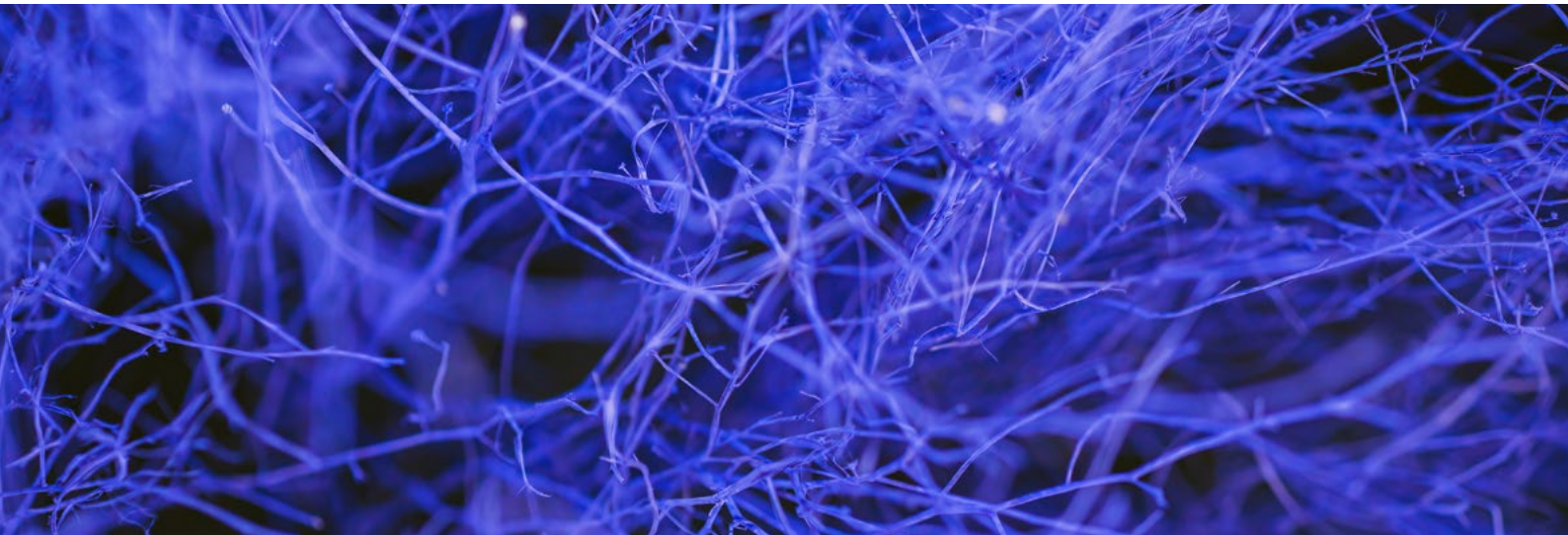
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Global cSDH embolization market share rankings

- Medtronic
- CERENOVUS
- Balt

Related M360 report series covering cSDH

- Neurovascular Devices (multiple geographies)
- Transcatheter Embolization and Occlusion Devices (multiple geographies)



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