

Market insights summary

United States neurostimulation device market

What's trending

Rapid adoption of hypoglossal nerve stimulation (HGNS) devices is driving the overall neurostimulation device market

- Reimbursement for HGNS has expanded rapidly, driven by broader payer coverage and clearer reimbursement pathways following Inspire Medical’s clinical and payer engagement efforts.
- LivaNova is expected to enter the U.S. market in 2026 with its aura6000, the first rechargeable HGNS device available in the U.S., which will likely support its adoption and intensify competition.
- Nyxoah’s leadless Genio system launched in 2025, with the anticipated future approval for treating patients with complete concentric collapse expected to further widen the treatable obstructive sleep apnea population.

Uptake of tibial nerve stimulation (TNS) devices is fueled by their minimally invasive nature compared to sacral nerve stimulation (SNS) devices

- In addition to their minimally invasive nature compared to SNS, the inclusion of implantable TNS procedures in the American Urological Association (AUA) and Society of Urodynamics, Female Pelvic Medicine & Urogenital Reconstruction guidelines for overactive bladder treatment will drive adoption of these devices.

Access more insights and data in the [report](#).
[Speak to our team](#) to see how we can power your innovation.

2024 U.S. neurostimulation device market snapshot

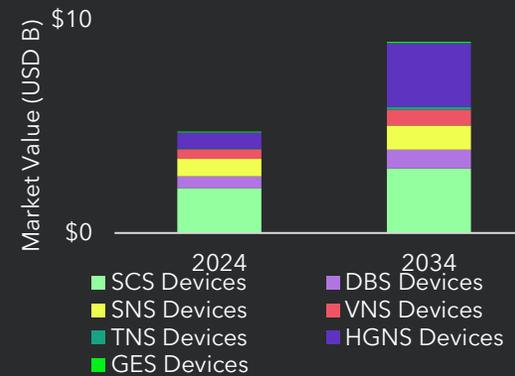
\$4.75B

Market revenue

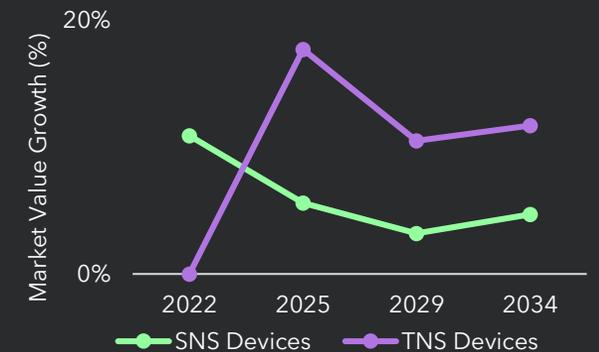
6.9%

CAGR ('19-'34)

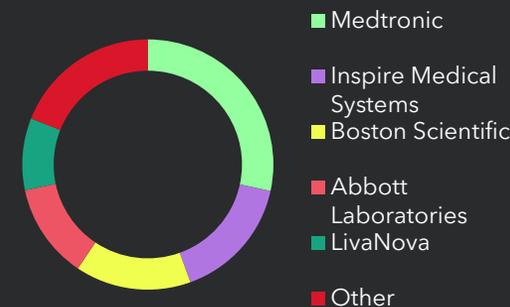
U.S. neurostimulation device market, by product type, USD (B)



U.S. TNS and SNS device market growth



2024 U.S. competitive landscape



Competitor insights

- Medtronic’s long-held leadership has been challenged by stronger competition in SCS, DBS, and SNS, but it has strengthened its position with advances in closed-loop technologies, including its Inceptiv SCS and promising adaptive DBS results.
- The rapid expansion of the HGNS device market, where Inspire Medical Systems held a monopoly, enabled it to surpass Boston Scientific to become the second-leading U.S. neurostimulation device player.
- In January 2026, Boston Scientific announced its intent to acquire TNS leader Valencia Technologies, positioning the company to strengthen its share going forward.

SCS: Spinal Cord Stimulation
 DBS: Deep Brain Stimulation
 GES: Gastric Electric Stimulation
 VNS : Vagus Nerve Stimulation