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Fractional Flow Reserve Market By Product (Guidewires, Monitoring Systems, Accessories and Software), By Technology (Invasive Monitoring, Non invasive Monitoring), By Application (Single vessel CAD, Multi vessel CAD), By End User (Hospitals, Cardiac Centres, Others): Global Opportunity Analysis and Industry Forecast, 2024-2035

https://marketpublishers.com/r/FE79FFA70AAAEN.html
Date: November 2024
Pages: 350
Price: US$ 2,655.00 (Single User License)
ID: FE79FFA70AAAEN

Abstracts

The global fractional flow reserve market was valued at $901.3 million in 2023, and is projected to reach $2,558.34 million by 2035, growing at a CAGR of 9.1% from 2024 to 2035.Fractional Flow Reserve (FFR) is a diagnostic measurement used to assess the severity of coronary artery stenosis (narrowing) by evaluating its impact on blood flow. FFR is defined as the ratio of the pressure measured in the coronary artery just beyond the blockage (distal pressure, Pd) to the pressure measured before the blockage, typically in the aorta or a healthy portion of the artery (proximal pressure, Pa). The formula for FFR is Pd/Pa.

There are both invasive and non-invasive methods to assess FFR. Invasive FFR typically involves wired coronary angiography, where a pressure-sensor-equipped guide wire is inserted into the coronary artery during cardiac catheterization. This wire measures pressures before and after the stenosis during induced hyperemia (often using adenosine). These pressure readings are used to calculate the FFR. Intracoronary Ultrasound (IVUS-FFR), which combines imaging with pressure measurements to provide a comprehensive assessment of the artery and stenosis characteristics. Non-invasive methods include angiography-FFR and computed tomography (CT)-based FFR. X-ray Angiography-FFR uses imaging to visualize blood vessels and assess blood flow dynamics. CT-based FFR employs advanced imaging

techniques to simulate blood flow and pressure in coronary arteries, providing insight into stenosis significance without catheterization.

FFR provides an accurate assessment of how much narrowing of coronary arteries is affecting blood flow, helping physicians determine whether the stenosis is likely to cause ischemia (reduced blood flow leading to heart muscle damage). The procedure requires the induction of hyperemia, a state of maximum blood flow and minimal vascular resistance, achieved by administering adenosine. In a healthy artery, FFR equals 1, indicating no significant obstruction. An FFR value of 0.8 or lower suggests a severe blockage, with high accuracy in predicting ischemia. FFR helps guide treatment decisions, including whether a stent or bypass surgery is needed by providing detailed information about the physiological impact of a coronary stenosis.

Increase in prevalence of cardiovascular diseases, particularly coronary artery diseases (CAD), is a major driver of FFR market growth. As more patients suffer from conditions such as coronary stenosis, healthcare providers seek advanced diagnostic tools including FFR to guide treatment decisions, specifically to determine whether angiography is necessary. For instance, as per the report of British Heart Foundation, in 2023, it was estimated that globally around 110 million men and 80 million women have coronary heart disease. These conditions result in the narrowing or blocking of coronary arteries, leading to reduced blood flow to the heart muscle and, in severe cases, heart attacks, which lead to surge in demand for fractional flow reserve procedure.

In addition, rise in technological advancements, such as AI-based FFR derived from CT, make the procedure faster and more accessible, encouraging its adoption, thereby fostering market growth. For instance, Cleerly, Inc., a Denver-based healthcare technology company provides Cleerly ISCHEMIA software device that delivers AI-powered coronary artery disease (CAD) risk assessments based on medical imaging results. Further, favorable reimbursement policies and the availability of updated clinical guidelines support FFR integration into routine cardiovascular care, boosting market growth.

However, high cost of FFR devices remains a significant barrier, particularly for smaller healthcare facilities or regions with limited healthcare budgets, thereby restricting market growth. In addition, the need for specialized equipment and trained personnel to perform and interpret FFR measurements limit adoption, especially in underdeveloped markets. On the other hand, advancements in non-invasive FFR technologies, which make diagnostic procedures less invasive and more accessible, provide an opportunity for market growth especially in the developed and emerging economies. In addition, the rise in healthcare infrastructure in emerging markets offers significant growth potential as these regions increasingly adopt advanced cardiovascular diagnostic tools.

The fractional flow reserve market is segmented into product, technology, application, end user, and region. On the basis of the product, it is classified into guidewires, monitoring systems, and accessories & software. On the basis of technology, the market is categorized into invasive monitoring and non-invasive monitoring. On the basis of application, the market is bifurcated into multi-vessel CAD and single-vessel CAD. On the basis of end user, the market is fragmented into hospitals, cardiac centres, and others. Region-wise, the market is studied across North America (U.S., Canada, and Mexico), Europe (Germany, France, UK, Italy, Spain, and rest of Europe), Asia-Pacific (Japan, China, India, Australia, South Korea, and rest of Asia-Pacific), and LAMEA (Brazil, South Africa, Saudi Arabia, Rest of LAMEA).

The major companies profiled in the report include Haemonetics Corporation, Abbott Laboratories, Boston Scientific Corporation, Bracco, Koninklijke Philips N.V., HeartFlow, Inc., CathWorks, Siemens, GE HealthCare, and Esaote Group. The key players operating in the market have adopted product approval, acquisition, and agreement as their key strategies to expand their product portfolio. For instance, in December 2023, Haemonetics Corporation completed its previously announced acquisition of OpSens Inc., a medical device cardiology-focused company delivering innovative solutions based on its proprietary optical technology. OpSens offers the OptoWire, a pressure guidewire that aims to improve clinical outcomes by accurately and consistently measuring Fractional Flow Reserve (FFR).

Key Benefits For Stakeholders

This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the fractional flow reserve market analysis from 2023 to 2035 to identify the prevailing fractional flow reserve market opportunities.

The market research is offered along with information related to key drivers, restraints, and opportunities.

Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-

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buyer network.

In-depth analysis of the fractional flow reserve market segmentation assists to determine the prevailing market opportunities.

Major countries in each region are mapped according to their revenue contribution to the global market.

Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

The report includes the analysis of the regional as well as global fractional flow reserve market trends, key players, market segments, application areas, and market growth strategies.

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Historic market data

SWOT Analysis

Key Market Segments

By Application

Single vessel CAD

Multi vessel CAD

By Product

Guidewires

Monitoring Systems

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Accessories and Software

By Technology

Invasive Monitoring

Non invasive Monitoring

By End User

Hospitals

Cardiac Centres

Others

By Region

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Spain

Rest of Europe

Asia-Pacific

Japan

China

India

Australia

South Korea

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

Rest of LAMEA

Key Market Players

Abbott Laboratories

Boston Scientific Corporation

Bracco

CathWorks

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Esaote Group

GE HealthCare

Haemonetics Corporation

HeartFlow, Inc.

Koninklijke Philips N.V.

Siemens

Contents

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CHAPTER 4: FRACTIONAL FLOW RESERVE MARKET, BY PRODUCT

4.1. Overview
  4.1.1. Market size and forecast
4.2. Guidewires
  4.2.1. Key market trends, growth factors and opportunities
  4.2.2. Market size and forecast, by region
  4.2.3. Market share analysis by country
4.3. Monitoring Systems
  4.3.1. Key market trends, growth factors and opportunities
  4.3.2. Market size and forecast, by region
  4.3.3. Market share analysis by country
4.4. Accessories and Software
  4.4.1. Key market trends, growth factors and opportunities
  4.4.2. Market size and forecast, by region
  4.4.3. Market share analysis by country

CHAPTER 5: FRACTIONAL FLOW RESERVE MARKET, BY TECHNOLOGY

5.1. Overview
  5.1.1. Market size and forecast
5.2. Invasive Monitoring
  5.2.1. Key market trends, growth factors and opportunities
  5.2.2. Market size and forecast, by region
  5.2.3. Market share analysis by country
5.3. Non invasive Monitoring
  5.3.1. Key market trends, growth factors and opportunities
  5.3.2. Market size and forecast, by region
  5.3.3. Market share analysis by country

CHAPTER 6: FRACTIONAL FLOW RESERVE MARKET, BY APPLICATION

6.1. Overview
  6.1.1. Market size and forecast
6.2. Single vessel CAD
  6.2.1. Key market trends, growth factors and opportunities
  6.2.2. Market size and forecast, by region
  6.2.3. Market share analysis by country

CHAPTER 7: FRACTIONAL FLOW RESERVE MARKET, BY END USER

CHAPTER 8: FRACTIONAL FLOW RESERVE MARKET, BY REGION

CHAPTER 9: COMPETITIVE LANDSCAPE

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CHAPTER 10: COMPANY PROFILES

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