

Cardiac Prosthetic Devices Market - Global Outlook and Forecast 2020-2025

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Abstracts

Get an in-depth analysis of COVID-19 impact on global cardiac prosthetic devices market.

The cardiac prosthetic devices market is expected to grow at a CAGR of over 14% during the period 2019–2025.

The global cardiac prosthetic devices market is expected to grow at a significant rate during the forecast period. The growing incidence of arrhythmia caused by arterial fibrillation (AF), structural heart diseases, especially heart valve diseases worldwide, is the major factor contributing to the growth. As the occurrence of AF in the general population in developed countries is between 1.5% and 3%, and in the elderly population around 20%, the market is likely to increase its market share considerably. Besides, the prevalence of several valvular disorders such as aortic stenosis (AS), mitral regurgitation, pulmonary stenosis, tricuspid regurgitation, and congenital heart defects has increased at a significant rate over the past few years globally.

The demand for transcatheter valve replacement techniques is growing at a phenomenal rate due to the growing awareness of the devices, favorable reimbursement coverage, and increased prevalence of high-risk patients. The increasing mortality rate due to severe heart valve diseases, especially in the elderly population, is a key global concern among healthcare providers. Therefore, to address this concern, medical practitioners prefer to perform heart valve replacement surgeries with transcatheter technique among high-risk patients. Hence, the increase in the target population, coupled with a growing risk of severe heart valve diseases, is expected to increase the demand for transcatheter surgical techniques.

The following factors are likely to contribute to the growth of the cardiac prosthetic devices market during the forecast period:

Arrival of Leadless Cardiac Pacemakers

High Growth Potential of Transcatheter Mitral Valve Replacement Devices

The emergence of Next-generation Heart Valve Replacement Devices

Rise in Strategic Acquisitions

The study considers the present scenario of the cardiac prosthetic devices market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

Cardiac Prosthetic Devices Market: Segmentation

This research report includes a detailed segmentation by products, end-user, and geography. The heart valve replacement devices market is growing at a healthy rate. An increase in the aging population and the presence of a large pool of patients with heart valve diseases is a major factor in driving the segment growth. The market is expected to grow significantly in the coming years due to the growing demand for transcatheter heart valve replacement procedures, especially TAVR and availability of next-generation prosthetic tissue heart valves.

The growth of the transcatheter heart valves can mainly be attributed to superior safety and efficacy features, coupled with the growing prevalence of heart valve diseases globally. The penetration is high in developed countries such as the US, Germany, Japan, France, the UK, Italy, and Spain. Similarly, advances in heart valve replacement technologies have helped to boost unit sales of tissue heart valves as the improvement in tissue valves has increased durability, which makes them suitable for implantation in young patients. However, the share of mitral tissue valve replacement procedures is expected to increase during the forecast period as end-users are opting for TAVR procedures over aortic tissue valve replacement procedures. The mechanical heart valves segment is likely to account for a slower rate than the tissue and transcatheter heart valves segments. The demand for mechanical heart valves is declining, especially

in developed economies, due to high risks and complications associated with these devices and the rapid evolution of advanced tissue and transcatheter heart valves with higher safety and efficacy. However, the global mechanical heart valves market is growing due to a steady increase in demand for mechanical heart valves in developing and emerging countries as these devices are relatively less expensive and offer long-life expectancy.

Hospitals are the major end-users for cardiac prosthetic devices as they perform a high number of implantation procedures. The increasing number of heart ailments and the growing implantations in the hospitals are fueling the growth of the segment. Healthcare professionals in hospitals use advanced cardiac prosthetic devices such as implantable pacemakers, CRT-Ps, transcatheter, tissue, and mechanical heart valves as a treatment procedure of cardiac diseases. The specialty cardiology centers segment is expected to grow at an absolute growth of over 140% during the forecast period. The segment is likely to grow at a faster rate than hospitals as they are equipped with better infrastructure for cardiology care. Specialty cardiac centers provide exclusive healthcare services to patients with suspected or diagnosed heart diseases. These centers are solely dedicated to treating patients that are suffering from several ailments such as arrhythmia and structural heart diseases. Ambulatory Surgery Centers (ASC) are growing at a promising rate as they are modern healthcare settings equipped with sophisticated healthcare infrastructure. This segment is expected to witness healthy growth, especially in developed countries, due to the growing popularity of procedures such as pacemaker implants and TAVR over conventional open surgical techniques for implanting cardiac prosthetic devices.

Market Segmentation by Products

Cardiac Peacemakers

Conventional Cardiac Peacemakers

Cardiac Resynchronization Therapy Peacemakers (CRT-Ps)

Heart Valve Replacement Devices

Transcatheter Heart Valves

Tissue Heart Valves

Mechanical Heart Valve

Market Segmentation by End-user

Hospitals

Specialty Cardiac Centers

ASCs

Insights by Geography

The growth in North America is mainly attributed to the high incidence of cardiac diseases such as heart valve disease and abnormal heart rhythms, the availability of advanced healthcare infrastructure and constant technological innovations, and growing acceptance for transcatheter and other MI procedures. A strong preference for MI procedures is one of the key reasons for high market share. Europe is the second-largest market for cardiac prosthetic devices. The region, particularly Western Europe, has well-established healthcare infrastructure with access to advanced healthcare services, especially for replacement procedures for heart diseases such as arrhythmia and heart valve diseases. Also, the increasing incidence of abnormal heart rhythm, heart valve disease, rapid adoption of advanced cardiac prosthetic devices, and high healthcare expenditures are driving market growth in Europe.

APAC is growing at a significant rate and is expected to grow during the forecast period. The presence of a large pool of patient population, improvements in healthcare infrastructure, and increased healthcare expenditure are the factors contributing to the growth. Further, the increasing prevalence of heart diseases is a key factor driving the cardiac prosthetic devices market.

Market Segmentation by Geography

Europe

Spain

Germany

Italy

France

UK

North America

US

Canada

APAC

South Korea

China

Japan

Australia

India

Latin America

Brazil

Argentina

Mexico

MEA

Turkey

Saudi Arabia

South Africa

Insights by Vendors

The global cardiac prosthetic devices market is highly competitive and characterized by the presence of a few key players and a significant number of other prominent players offering a wide range of advanced and innovative devices. The market is witnessing rapid technological advancements and is significantly affected by new product launches. Abbott, BIOTRONIK, Boston Scientific, Edwards Lifesciences, and Medtronic are the major players with dominant shares in the market. The dominant presence of major players is attributable to their strong presence and endorsement for their products due to the availability of abundant clinical data/evidence regarding safety and efficacy.

Key Vendors

Medtronic

Boston Scientific

Abbott

Edwards Lifesciences

BIOTRONIK

Other Vendors

Braile Biomédica

Braile Biomédica

CryoLife

Labcor Laboratórios

Lepu Medical

Lifetech Scientific

LivaNova

MicroPort Scientific

Meril Life Sciences

MEDICO

Shree Pacetronix

TTK Healthcare

VENUS MEDTECH

Vitatron

Key Vendors

Medtronic, Boston Scientific, Abbott, Edwards Lifesciences, BIOTRONIK, Braile Biomédica, CryoLife, Labcor Laboratórios, Lepu Medical, Lifetech Scientific, LivaNova, MicroPort Scientific, Meril Life Sciences, MEDICO, Shree Pacetronix, TTK Healthcare, VENUS MEDTECH, and Vitatron.

Key Market Insights

The analysis of the cardiac prosthetic devices market provides sizing and growth opportunities for the period 2019–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.

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