

North America Interventional Cardiology Market - 2025-2033

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Abstracts

Overview

The North America interventional cardiology market reached US\$ 7.04 billion in 2024 and is expected to reach US\$ 11.98 billion by 2033, growing at a CAGR of 6.2% during the forecast period 2025-2033.

Interventional cardiology is a specialty that diagnoses and treats heart and blood vessel conditions using small tubes called catheters. Working with these small tubes, which they put through blood vessels, allows providers to avoid doing open-heart surgery. Yet they achieve results that can be life-saving, like when treating a heart attack. In interventional cardiology, the focus is on ensuring the blood in the body flows the way it should. Providers in this area of cardiology identify and fix issues that get in the way of blood flow.

It is an important advancement in cardiovascular care, providing patients with effective treatment alternatives that involve fewer risks and faster recovery times. As technology advances, this field is anticipated to develop further, embracing novel treatments and equipment that improve patient outcomes when managing heart disease. Interventional cardiology treats acute and chronic cardiovascular conditions by threading thin catheters and specialized tools to clear the blockage and restore blood flow. It uses minimally invasive procedures to diagnose and treat heart diseases.

Market Dynamics: Drivers & Restraints

Rising Structural Heart Disease Interventions

The rise of structural heart disease interventions is a significant driver of the growth in the North America interventional cardiology market due to several factors, including advancements in technology, increasing patient acceptance of less invasive procedures, and growing awareness of heart valve diseases.

Advances in device design and delivery systems are making structural heart interventions more accessible and effective. Innovations like the MitraClip by Abbott for mitral valve repair and the Tendyne system for mitral valve replacement are leading examples. These devices allow for percutaneous repair, reducing the need for open-heart surgery and offering faster recovery times.

Additionally, in February 2024, BIOTRONIK introduced the Micro Rx catheter, a novel rapid exchange microcatheter developed to easily enhance guidewire support during percutaneous coronary interventions (PCI). This cutting-edge device is manufactured by IMDS (Interventional Medical Device Solutions). Micro Rx catheter marks the fourth IMDS product BIOTRONIK has brought to the U.S., creating a compelling portfolio of devices that includes Nhancer Rx, TrapIT, and ReCross catheters.

The integration of advanced imaging techniques such as 3D echocardiography, OCT, and IVUS is enhancing procedural success rates in structural heart disease interventions. These technologies enable the detailed visualization of heart structures, thereby improving the precision of device placement. Devices such as transcatheter heart valves, closure devices, and image-guided navigation systems (e.g., Philips EchoNavigator) have made interventions more effective and precise. AI and 3D imaging are also enhancing pre-op planning and real-time decision-making.

For instance, in May 2022, Royal Philips announced the global launch of EchoNavigator 4.0, its next-generation image-guided therapy solution for treating structural heart disease. The unveiling took place at the EuroPCR 2022 conference. While EchoNavigator 4.0 represents a significant advancement in image integration and guidance during heart procedures, Philips noted that the system is not yet available in all markets, including the United States and China.

The rising number of structural heart disease interventions is directly driving demand for specialized interventional cardiology tools and devices in North America. This includes catheters, stents, imaging systems, AI-assisted guidance platforms, and more, contributing significantly to market growth. The use of AI-driven imaging systems is expected to further refine procedural planning and execution, reducing complications and optimizing patient outcomes.

The shift from surgical to percutaneous procedures in treating severe aortic stenosis and mitral regurgitation is expanding due to better patient selection criteria, improved procedural outcomes, and shorter recovery times. The aging population and rising prevalence of valvular heart diseases are contributing to this trend.

For instance, according to the American College of Cardiology, since the approval of the first transcatheter aortic valve replacement (TAVR) device in 2011, more than 276,000 patients have undergone a TAVR procedure in the United States.

High Cost of Devices and Procedures

The high cost of devices and procedures is expected to hamper the growth of the North America interventional cardiology market due to various factors, including device prices, procedural costs, and associated healthcare expenses. This economic barrier limits accessibility and affordability, particularly in regions with less advanced healthcare systems or lower economic capacities.

The cost of advanced interventional cardiology devices, such as drug-eluting stents (DES), bioresorbable stents, and drug-coated balloons (DCBs), is a significant barrier, making them unaffordable for many patients, especially in developing regions.

For instance, a drug-eluting stent can cost between \$1,000 and \$3,000 in the U.S., and sometimes more depending on the technology used. This can limit access to these advanced technologies for patients in need.

According to the American Medical Association, across hospitals, the median price ranged from \$204 to \$2,588 for an echocardiogram. The median price ranged from \$2821 to \$9,382 for a right heart catheterization [RHC], \$2,868 to \$9,203 for a coronary angiogram, and \$657 to \$25,521 for a percutaneous coronary intervention [PCI].

Segment Analysis

The North America interventional cardiology market is segmented based on modality and end-user.

Modality:

The stents segment in the modality is expected to dominate the North America

interventional cardiology market share

A stent is a very small mesh tube commonly used to hold open passages in the body, for example, in weak or narrowed blood vessels. Stents are mostly used for the narrowing of the coronary arteries, which supply oxygen to the heart. Stents can also be used to treat an aneurysm bulge in the wall of an artery or narrowed airways in the lungs.

The segment is further divided into drug-eluting stents, bare-metal stents, and bio-absorbable stents. Drug-eluting stents (DES) are mesh tubes coated with medication to treat narrowed arteries, preventing blood clots and restenosis. Bare-metal stents (BMS) are simple metal tubes without drug coating, providing structural support and keeping the artery open. Bio-absorbable stents are innovative stents that dissolve over time, leaving no permanent implant behind.

The stents segment is expected to grow during the forecast period owing to factors like novel product launches, significant advancements, expansion and partnerships, government initiatives, and other factors that help the segment to propel during the forecast period.

For instance, in 2022, a medical team at Children's Hospital Los Angeles (CHLA) became the first in the world to implant a new type of cardiac stent designed specifically for babies and young children. This stent is called the Minima. What makes it so special is that it can grow with the child, meaning it can be expanded over time as the child grows, and eventually reach adult size. This marks a significant advancement in the North American interventional cardiology market.

Competitive Landscape

The major players in the North America interventional cardiology market include Medtronic, Terumo Corporation, Boston Scientific Corporation, Abbott, Canon Medical Systems Corporation, Teleflex Incorporated, B. Braun SE, Johnson & Johnson Services, Inc., Koninklijke Philips N.V., and Cook Medical, among others.

Key Developments

In December 2024, Terumo Interventional Systems (TIS) launched the commercial availability of its R2P NaviCross peripheral support catheter in the U.S., further expanding the company's radial-to-peripheral (R2P) portfolio.

In October 2024, Medtronic plc received USFDA approval for the Affera Mapping and Ablation System with Sphere-9 Catheter, an ablation catheter for the treatment of persistent atrial fibrillation (AFib) and RF ablation of cavotricuspid isthmus (CTI) dependent atrial flutter.

In July 2024, Teleflex announced U.S. FDA approval for the Ringer Perfusion Balloon Catheter (PBC), the only commercially available Percutaneous Transluminal Coronary Angioplasty (PTCA) perfusion balloon.

In March 2024, Boston Scientific received U.S. Food and Drug Administration (FDA) approval for its Agent Drug-Coated Balloon (DCB) for the treatment of coronary in-stent restenosis (ISR) in patients with coronary artery disease.

Why Purchase the Report?

Pipeline & Innovations: Reviews ongoing clinical trials and product pipelines and forecasts upcoming advancements in medical devices and pharmaceuticals.

Product Performance & Market Positioning: Analyze product performance, market positioning, and growth potential to optimize strategies.

Real-World Evidence: Integrates patient feedback and data into product development for improved outcomes.

Physician Preferences & Health System Impact: Examines healthcare provider behaviors and the impact of health system mergers on adoption strategies.

Market Updates & Industry Changes: This covers recent regulatory changes, new policies, and emerging technologies.

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Post-market Surveillance: Uses post-market data to enhance product safety and access.

Pharmacoeconomics & Value-Based Pricing: Analyzes the shift to value-based pricing and data-driven decision-making in R&D.

The North America interventional cardiology market report delivers a detailed analysis with 36 key tables, more than 29 visually impactful figures, and 136 pages of expert insights, providing a complete view of the market landscape.

Target Audience 2024

Manufacturers: Pharmaceutical, Medical Device, Biotech Companies, Contract Manufacturers, Distributors, Hospitals.

Regulatory & Policy: Compliance Officers, Government, Health Economists, Market Access Specialists.

Application & Innovation: AI/Robotics Providers, R&D Professionals, Clinical Trial Managers, Pharmacovigilance Experts.

Investors: Healthcare Investors, Venture Fund Investors, Pharma Marketing & Sales.

Consulting & Advisory: Healthcare Consultants, Industry Associations, Analysts.

Supply Chain: Distribution and Supply Chain Managers.

Consumers & Advocacy: Patients, Advocacy Groups, Insurance Companies.

Academic & Research: Academic Institutions.

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