

Defibrillator-Market Insights, Competitive Landscape and Market Forecast-2026

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Abstracts

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DEFIBRILLATORS MARKET BY PRODUCT TYPE (IMPLANTABLE CARDIOVERTER DEFIBRILLATOR [SINGLE CHAMBER ICD, DUAL CHAMBER ICD, CRT-D, SUBCUTANEOUS ICD (S-ICD)], AND EXTERNAL DEFIBRILLATOR [SEMI-AUTOMATED, AUTOMATED, AND WEARABLE]), BY END USER (HOSPITALS, AMBULATORY SURGICAL CENTRES, HOMECARE SETTINGS, AND OTHERS), BY GEOGRAPHY IS PROJECTED TO GROW AT A STEADY CAGR FORECAST TILL 2026 OWING TO INCREASING CASES OF CARDIAC DISORDERS AND INTEGRATION OF ADVANCED TECHNOLOGY

Global Defibrillators Market was valued at USD 9.89 billion in 2020, growing at a CAGR of 3.10% during the forecast period from 2021 to 2026, to reach USD 11.31 billion by 2026. The demand for Defibrillators is primarily associated with the growing incidence of cardiac disorders, integration of advanced technology, increasing investments by government and private manufacturers, and rising awareness programs regarding cardiovascular disorders and usage of defibrillators, among others.

DEFIBRILLATORS MARKET DYNAMICS:

Atrial fibrillation which is characterized by an irregular and most often with rapid heart rate can increase the risk of stroke, heart failure, and other heart-related complications in the old aged population and individuals suffering chronic conditions such as high blood pressure, obesity, and heart disorders. According to a study published in NCBI 2021, atrial fibrillation is the most frequent cardiac arrhythmia and the worldwide incidence of atrial fibrillation in 2017 was registered to be 3.046 million. Moreover, as

per the WHO 2021 report, 85% of all cardiovascular deaths are due to heart attacks and stroke. Defibrillators are devices used to restore a normal heartbeat by sending an electric shock to the heart and are used to correct or prevent arrhythmias. Therefore, the rising incidence of heart-associated disorders is likely to shoot the demand for defibrillators.

Further, the introduction of several new devices with simplified implantation technology, smaller size, reducing or eliminating leads implanted in the heart is also anticipated to augment the market for defibrillators. For instance, in 2019, Biotronik launched the Acticor device family of new ICDs and cardiac resynchronization therapy defibrillators (CRT-Ds), the hybrid ICD Acticor systems offer dual-chamber diagnostics without the need for an atrial lead.

Moreover, defibrillators were found to be extremely beneficial in reviving sudden cardiac arrest in COVID-19 which further pushed for the demand for defibrillators in the pandemic situation. Also, timely supportive regulations and increasing adoption are further expected to provide the market for defibrillators with a lucrative growth platform in the forecasted period. Thus, all these factors are projected to drive the growth of the global market for Defibrillator.

Certain factors such as lack of awareness regarding early corrective measures for sudden cardiac arrest are anticipated to pose a minor hurdle for the growth of the Defibrillators market.

DEFIBRILLATORS MARKET SEGMENT ANALYSIS:

Defibrillator Market by Product Type (Implantable Cardioverter Defibrillator [Single Chamber ICD, Dual Chamber ICD, CRT-D, Subcutaneous ICD (S-ICD)], and External Defibrillator [Semi-Automated, Automated, and Wearable]), by End User (Hospitals, Ambulatory Surgical Centers, Homecare Settings, and Others), and by Geography (North America, Europe, Asia-Pacific, and Rest of the World).

In the Defibrillators product type segment, ICD (Implantable Cardioverter Defibrillator) is expected to hold the largest share in the market as there are different types of ICDs such as one chambered, dual-chambered ICDs, subcutaneous ICDs, and magnetic resonance imaging (MRI)-safe ICDs available in the market. For instance, S-ICDs which are a recent development in the field of defibrillators have many advantages over traditional or transvenous ICDs. These mainly include lower risk of vascular injury or pneumothorax, absence of leads the main advantage making it a great alternative for

children with congenital heart diseases or patients with no venous access who were unsuitable for transvenous ICD. Also, the device is well tolerated than the traditional (transvenous) ICDs thereby raising the demand for ICD in the coming years.

In addition, new product approval in the market by regulatory bodies is also expected to surge the market. For instance, recently in the year 2018, Abbott received FDA approval for the MR-conditional labeling for the Quadra Assura MP CRT-D and Fortify Assura ICD. Moreover, the same company has received FDA clearance for MR-conditional labeling for one of the company's most widely used ICDs and associated high voltage leads — the Ellipse ICD. Therefore, recent product approvals along with increased manufacturing of essential medical devices by the key players are the factors expected to contribute to the Defibrillators market growth.

The other product segment, i.e., the external defibrillator market is also projected to show lucrative growth in the forthcoming period. The rapid technological innovation in the product line, favorable government regulation are some of the factors that are anticipated to push the defibrillators market in the coming years.

NORTH AMERICA IS EXPECTED TO DOMINATE THE OVERALL DEFIBRILLATORS MARKET:

Among all the region, North America is expected to dominate the overall Defibrillator market during the forecast period. This domination is due to the growing prevalence of cardiovascular diseases, access to better healthcare infrastructure couple with the presence of major market players in the region. Also, the supportive reimbursement programmes covering the costs for the implantable devices as well as the procedure further encouraged people to opt for such devices in the region.

Further, In the United States, the risk of being affected by cardiovascular disease is increasing dramatically. According to the CDC report, in 2020, heart disease was the leading cause of death among most men and women in the United States and about 655,000 Americans died from heart disease each year in the region. The rising concern of cardiovascular disorder in the region is expected to boost the market. Furthermore, the presence of key manufacturers in the region such as Stryker, Abbott, Boston Scientific Corporation, among others in the region will surge the market due to various commercialization activities including collaborations, product launch, merger acquisition, and others in the field of both ICDs and External defibrillator is projected to fuel the market in the region. For instance, in 2019, Stryker launched LIFEPAK® CR2 Defibrillator with LIFELINK central™ AED Program Manager in the United States.

Moreover, the rising installation of external defibrillators at public places apart from hospitals aiming to prevent sudden cardiac arrest is also a prominent factor contributing to the market growth. Hence, all these factors along with product launches are propelling the defibrillators market.

Europe and Asia-Pacific region have the future potential growth for the Global Defibrillator. This is due to the rising burden of cardiovascular diseases in the European region countries and Asia countries also. The rising healthcare costs, improving healthcare infrastructure, increase in disposable income in growing economies such as China, India, among others are other factors that boost the market. In addition countries such as Japan has a high penetration of defibrillators due to the presence of giant companies that are focused on expanding the market in other geographies is also likely to augment the global defibrillators market.

DEFIBRILLATORS MARKET KEY PLAYERS:

Some of the key market players operating in the Defibrillator market includes Medtronic; Abbott; Boston Scientific Corporation; Stryker; Koninklijke Philips N.V.; Zoll Medical Corporation; Biotronik, Inc.; Nihon Kohden Corporation and others.

RECENT DEVELOPMENTAL ACTIVITIES IN DEFIBRILLATORS MARKET :

In July 2020, Phillips received 510(k) clearances from the FDA for its professional defibrillator (Tempus LS- Manual), offering its remote monitor and defibrillator solution (Tempus ALS) to EMS customers in the U.S.

? In June 2020, ZOLL® Medical Corporation, an Asahi Kasei Group Company received premarket approval (PMA) for its ZOLL AED 3® defibrillator with enhanced real CPR help, integrated child rescue, and wireless connectivity.

? In February 2020, Abbott received CE Mark for the new Gallant™ implantable cardioverter defibrillator (ICD) and cardiac resynchronization therapy defibrillator (CRT-D) devices. The devices offer new opportunities for patient engagement and remote monitoring through new smartphone connectivity and connected applications. Additional benefits include a patient preferred design, improved battery longevity, and MRI compatibility.

KEY TAKES AWAY FROM THE DEFIBRILLATORS MARKET REPORT STUDY

? Market size analysis for current market size (2020), and market forecast for 5 years (2021-2026)

? The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the Defibrillators market.

? Top key product/services/technology developments, merger, acquisition, partnership, joint venture happened for last 3 years

? Key companies dominating the Global Defibrillators Market.

? Various opportunities available for the other competitor in the Defibrillators Market space.

? What are the top performing segments in 2020? How these segments will perform in 2026.

? Which is the top-performing regions and countries in the current market scenario?

? Which are the regions and countries where companies should have concentrated on opportunities for Defibrillators market growth in the coming future?

TARGET AUDIENCE WHO CAN BE BENEFITED FROM DEFIBRILLATORS MARKET REPORT STUDY

? Defibrillators providers

? Research organizations and consulting companies

? Defibrillators-related organization, association, forum, and other alliances

? Government and corporate offices

? Start-up companies, venture capitalists, and private equity firms

? Distributors and Traders in Defibrillators

? Various End-users who want to know more about the Defibrillators Market and latest

technological developments in the Defibrillators market.

FREQUENTLY ASKED QUESTIONS FOR DEFIBRILLATORS MARKET:

What are Defibrillators?

Defibrillators are devices that give a high-energy electric shock to the heart of an individual who suffers a cardiac arrest. These can be implantable, external, and wearable based on their modality.

What is the market for Global Defibrillators?

Global Defibrillator Market was valued at USD 9.89 billion in 2020, growing at a CAGR of 3.10% during the forecast period from 2021 to 2026, to reach USD 11.31 billion by 2026.

What are the drivers for Global Defibrillators Market?

The major factors responsible for driving the defibrillators market are the increasing prevalence of cardiac disorders, growing public-private investment for developing new and technologically advanced products, rising awareness associated with the defibrillators in cardiac associated diseases in many countries.

What are the key players operating in Global Defibrillators Market?

Some of the key market players operating in the Defibrillator market include Medtronic; Abbott; Boston Scientific Corporation; Stryker; Koninklijke Philips N.V.; Zoll Medical Corporation; Biotronik, Inc.; Nihon Kohden Corporation, and others.

What regions has the highest share in the Defibrillators market?

North America is expected to dominate the overall Defibrillator market during the forecast period, 2021-2026 owing to the growing prevalence of cardiovascular diseases, access to improved healthcare infrastructure coupled with the presence of major market players in the region. Moreover, enhanced reimbursement programs for the implantable devices as well as the procedure further encouraged people to opt for such devices in the region.

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