

Active Implantable Devices Market – Global Opportunity Analysis And Industry Forecast (2017-2022)

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Abstracts

Active Implantable Devices Market By Product Type [Implantable Cardioverter Defibrillators (Transvenous ICDs and Subcutaneous ICDs), Neuromodulators (Spinal Cord Stimulators, Deep Brain Stimulators, Sacral Nerve Stimulators, Vagus Nerve Stimulators, and Gastric Electrical Stimulators), Implantable Cardiac Pacemakers, Implantable Hearing Devices, Ventricular Assist Devices, Implantable Heart Monitors/Insertable Loop Recorders] – Global Opportunity Analysis and Industry Forecast To 2022.

The digital age is changing the nature of health care delivery and offering explosive growth for medical devices within built wireless technologies (including both implanted and wearable devices) to control bodily functions and to measure an array of physiological parameters. Implanted devices can control heart rhythms, monitor hypertension, provide functional electrical stimulation of nerves, operate as glaucoma sensors, and monitor bladder and cranial pressure. Many wireless medical devices communicate with nearby receivers that are connected to landline networks, cellular systems or broadband facilities that access the internet. Patients no longer need to be tethered to one spot by a tangle of cables, creating a safer workplace for medical professionals and a more comfortable environment for the patient with a reduced risk of infection. Wireless monitoring permits patients to thrive outside medical environments, reducing health care costs and enabling physicians to obtain vital information on a real-time basis without the need for office visits or hospital admissions.

The global active implantable devices market is expected to grow at a CAGR of 6.7% from 2017 to 2022 to reach USD 24.02 billion by 2022. The rising need for faster, effective, and safer devices is growing rapidly, which is majorly fueling the growth of the

market. In addition, major factors such as increasing burden of cardiovascular diseases, rising prevalence of neurological disorders, growing investment & funds to develop technologically advanced products, and expanded applications of neurostimulators are expected to drive the growth of this market. However, stringent regulations for approvals & rising product recalls, high cost of implants, and unfavorable reimbursement scenario restricts the growth of the market to some extent. Further, increasing pricing pressure on market players poses a great challenge for the growth of this market.

The report further gives an extensive outlook on the major product categories and their sub-segments with detailed analysis of key trends, drivers, and key players, along with the detailed market size & forecasts for each individual segment at both regional & country level. The global active implantable devices market is mainly segmented by product type into implantable cardioverter defibrillators, neuromodulation, implantable cardiac pacemakers, implantable hearing devices, ventricular assist devices, and implantable heart monitors/insertable loop recorders. Implantable cardioverter defibrillators held the largest share of active implantable devices in 2016, primarily due to rising adoption of ICDs for the prevention of sudden cardiac deaths (SCD) in patients at high risk for SCD with increasing incidence of cardiac arrest and atrial fibrillation, and growing burden of patients with high blood pressure. According to the National Institute of Health, it is estimated that about 40-50% of all cardiovascular deaths are sudden cardiac deaths (SCDs) and about 80% of these are caused by ventricular tachyarrhythmias. Moreover, about 6 million sudden cardiac deaths occur annually due to ventricular tachyarrhythmias.

The implantable cardioverter defibrillators (ICDs) market is further sub-segmented into transvenous ICDs and subcutaneous ICDs with transvenous ICDs accounting for the major share, owing to their wide availability & adoption worldwide, anti-tachycardia pacing feature, increasing prevalence of cardiovascular diseases, and growing demand of the implantable therapy. Transvenous implantable cardioverter defibrillator market is further segmented into biventricular ICDs/cardiac resynchronization therapy defibrillators (CRT-DS), dual-chamber ICDs, and single-chamber ICDs.

An exhaustive analysis of the geographical scenario of the industry for the five major geographies: North America, Europe, Asia-Pacific, Latin America, and Middle East & Africa are included in the geographical analysis section. These regions are further analyzed at a country level with the detailed qualitative and quantitative analysis. The geographical analysis provides detailed insights on the key trends of the industry in the listed regions & countries, identifying the demographic & economic impact, government

& private investments, and regulatory scenario. The report identifies North America to be the largest market, followed by Europe, Asia-Pacific, Latin America and Middle East & Africa.

However, Asia-Pacific region is slated to register the fastest growth in the global active implantable devices market during the forecast period, primarily due to the increasing population living with various chronic diseases, changing lifestyles, and rising inclination towards fast food. In addition, rising public & private spending for the development of proper healthcare infrastructure, increasing aging population, rising focus of the key players to expand in emerging countries like China & India, and increasing affordability of the middle-class population in the region are further expected to indirectly support the growth of active implantable devices market in this region. The geographical analysis section also comments on the key market players shaping the growth of the industry in the respective countries.

The report also includes the competitive landscape based on extensive assessment of the key strategic developments adopted by the leading market participants in the industry over the past 3 years (2014-2017). The study has also incorporated the market share analysis of leading players and detailed profiles of top 11 market players across the value chain of the industry, including detailed financial performance, product offerings, and strategic growth initiatives of each player.

The report provides the market share analysis by key players for various segments such as active implantable cardiovascular devices, neuromodulation, and implantable hearing devices. As a whole the active implantable devices market is highly consolidated with the top three players namely Medtronic plc (Ireland), Abbott Laboratories (U.S.), and Boston Scientific Corporation (U.S.) together holding around three-fourth share of this market in 2016. The other key players in the global active implantable devices market are BIOTRONIK SE & Co. KG (Germany), and LivaNova PLC (U.K.), Cochlear Limited (Australia), MED-EL (Austria), Sonova Holding AG (Switzerland), William Demant Holding A/S (Denmark), and Nurotron Biotechnology Co., Ltd. (China).

Scope of the Report:

Market by Product:

Implantable Cardioverter Defibrillators

Transvenous Implantable Cardioverter Defibrillators

Biventricular Implantable Cardioverter Defibrillators

Dual-Chamber Implantable Cardioverter Defibrillators

Single-Chamber Implantable Cardioverter Defibrillators

Subcutaneous Implantable Cardioverter Defibrillators

Implantable Cardiac Pacemakers

Ventricular Assist Devices

Implantable Heart Monitors/Insertable Loop Recorders

Implantable hearing devices

Neurostimulators

Spinal Cord Stimulators

Deep Brain Stimulators

Sacral Nerve Stimulators

Vagus Nerve Stimulators

Gastric Electrical Stimulators

Market by Geography

North America

U.S.

Canada

Europe

Germany

France

U.K.

Italy

Spain

Rest of Europe

Asia-Pacific

Japan

China

India

Rest of Asia-Pacific

Rest of World

Latin America

Middle East and Africa

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