

Structural Heart Market Outlook 2025-2034: Market Share, and Growth Analysis By Product (Occluders, Annuloplasty Rings, Heart Valve Balloons, Other Products), By Procedure (Heart Valve Stenosis, Heart Valve Regurgitation, Left Atrial Appendage Closure), By End Users

<https://marketpublishers.com/r/S27E8D20A48CEN.html>

Date: October 2025

Pages: 160

Price: US\$ 3,950.00 (Single User License)

ID: S27E8D20A48CEN

Abstracts

The Structural Heart Market is valued at USD 13.4 billion in 2025 and is projected to grow at a CAGR of 7.7% to reach USD 26.2 billion by 2034. The structural heart market is a rapidly evolving segment within the global cardiovascular device industry. It focuses on the treatment of heart valve diseases and congenital heart defects, including conditions such as aortic stenosis, mitral regurgitation, and patent foramen ovale. These structural heart conditions often require interventions such as valve repair or replacement, typically using advanced devices like transcatheter heart valves, septal occluders, and closure devices. The market has been driven by increasing demand for minimally invasive procedures that offer lower risk, shorter recovery times, and improved patient outcomes. With the growing prevalence of heart diseases and an aging population globally, there is a significant need for innovative solutions to manage and treat heart valve disorders. Technological advancements in both diagnostic tools and therapeutic devices have contributed to the market's growth, with transcatheter aortic valve implantation (TAVI) and other transcatheter procedures leading the way. These innovations have opened up treatment options for patients who were previously considered too high-risk for traditional open-heart surgery, contributing to the expansion of the structural heart market across various regions. Additionally, the rise of personalized medicine and improved understanding of heart diseases has led to better-targeted interventions, further driving market demand. The structural heart market saw notable developments, especially with the continued adoption of minimally invasive

procedures such as TAVI and transcatheter mitral valve repair (TMVR). These procedures have revolutionized the treatment of heart valve diseases, offering better outcomes and reducing the need for traditional open-heart surgeries. The growth of the market in 2024 was further fueled by the approval and adoption of next-generation devices, which provided enhanced safety profiles, durability, and improved patient outcomes. For instance, newer-generation TAVI devices incorporated advancements in design and materials, offering better valve performance and reducing complications. The expansion of these procedures into low- and intermediate-risk patient populations also contributed to market growth. Moreover, the integration of digital health technologies, such as real-time monitoring systems and AI-driven diagnostics, allowed for more precise and individualized treatment planning, improving procedural efficiency. However, challenges persisted in the market, including high procedure costs, reimbursement complexities, and the need for highly trained healthcare professionals to perform these advanced interventions. Despite these hurdles, the structural heart market continued to grow, driven by the increasing adoption of transcatheter heart valve therapies, which offered a more accessible and safer alternative to open-heart surgery. The structural heart market is expected to experience further growth, driven by continuous innovation in device technology and the expanding patient base. As the number of patients diagnosed with structural heart diseases rises, there will be greater demand for innovative treatments that can address these conditions more effectively and with fewer risks. Advancements in device technology, such as improved valve designs, better durability, and the development of bioresorbable materials, will likely make treatments more effective and patient-friendly. The expansion of structural heart treatments into underserved and emerging markets, where access to advanced healthcare solutions is increasing, will further drive market growth. Additionally, the increasing emphasis on personalized medicine will contribute to the development of tailored treatments that target the specific needs of individual patients. The use of robotics and AI technologies in structural heart procedures will also enhance precision, improve outcomes, and reduce procedural risks. While the market is expected to continue growing, challenges related to high treatment costs, regulatory hurdles, and the complexity of procedures may hinder the pace of adoption in some regions. Overall, the structural heart market is poised for continued expansion, driven by both technological innovations and increasing patient demand for effective heart disease treatments.

Key Insights Structural Heart Market

Growing adoption of minimally invasive transcatheter heart valve therapies, including TAVI and TMVR, as a safer alternative to open-heart surgery.

Technological advancements in device design, including enhanced valve performance and the use of bioresorbable materials for improved outcomes.

Integration of digital health technologies, such as real-time monitoring and AI-driven diagnostics, to optimize treatment planning and improve patient care.

Increased focus on personalized medicine, with tailored treatments being developed to meet the specific needs of individual patients based on genetic and clinical data.

Expansion of structural heart therapies into emerging markets, where access to advanced medical treatments is improving as healthcare infrastructure develops.

The rising global prevalence of cardiovascular diseases, particularly heart valve disorders, driving the need for effective structural heart treatments.

Growing demand for minimally invasive, lower-risk procedures, including transcatheter therapies, that provide better outcomes and faster recovery times.

Advances in device technology and design, improving safety, durability, and effectiveness of structural heart devices, thus expanding patient access to these treatments.

The shift towards personalized medicine, enabling more accurate and targeted treatment options that are tailored to the specific needs of individual patients.

High treatment costs, reimbursement complexities, and the need for specialized training in transcatheter procedures continue to pose significant barriers to widespread adoption, particularly in emerging markets.

Structural Heart Market Segmentation

By Product

Occluders

Annuloplasty Rings

Heart Valve Balloons

Other Products

By Procedure

Heart Valve Stenosis

Heart Valve Regurgitation

Left Atrial Appendage Closure

By End Users

Hospitals

Ambulatory Surgical Centers

Cardiac Centers

Key Companies Analysed

Abbott Laboratories

Comed BV

Medtronic plc

Labcor Laborat?rios Ltda.

Boston Scientific Corporation

Edwards Lifesciences Corporation

Trane Technologies

Lepu Medical Technology Co. Ltd.

LivaNova PLC

Biomerics LLC

Venus Medtech (Hangzhou) Inc.

Cryolife Inc.

Endologix Inc.

Shockwave Medica Inc.

Braile Biom?dica

JenaValve Technology Inc.

Corvia Medical Inc

HLT Medical

On-X Life Technologies Inc.

Symetis SA

Magenta Therapeutics

PASCAL Medical

Micro Interventional Devices Inc.

CardioKinetix Inc

XELTIS BV

Tendyne Holdings Inc.

Q'Apel Medical Inc.

Neovasc Inc.

NVT AG

XpandOrtho Inc.

Z-Medical GmbH + Co. KG

Structural Heart Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

Structural Heart Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — Structural Heart market data and outlook to 2034

United States

Canada

Mexico

Europe — Structural Heart market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Structural Heart market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Structural Heart market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Structural Heart market data and outlook to 2034

Brazil

Argentina

Chile

Peru

** We can include data and analysis of additional countries on demand.*

Research Methodology

This study combines primary inputs from industry experts across the Structural Heart value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the Structural Heart industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the Structural Heart Market Report

Global Structural Heart market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Structural Heart trade, costs, and supply chains

Structural Heart market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Structural Heart market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Structural Heart market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and Structural Heart

supply chain analysis

Structural Heart trade analysis, Structural Heart market price analysis, and Structural Heart supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Structural Heart market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

** The updated report will be delivered within 3 working days*

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