

Transcatheter Pulmonary Valve Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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Abstracts

Transcatheter Pulmonary Valve Market Summary

Introduction

Transcatheter pulmonary valves (TPVs), used for conditions like pulmonary stenosis and regurgitation, offer minimally invasive solutions for congenital heart disease (CHD), affecting 1.35 million newborns annually. TPVs reduce recovery time by 50% and repeat surgery risks by 20%-30%. The market is driven by rising CHD survival rates, aging CHD patients, and CVD prevalence (300 million cases in China). Innovations like self-expanding valves and Al-assisted planning enhance outcomes. The global market is projected to reach between USD 40 million and USD 60 million in 2025, with a CAGR of 4.2% to 5.9% through 2030.

Regional Analysis

North America: The U.S. leads with advanced CHD care, while Canada focuses on pediatric interventions.

Europe: Germany, France, and the UK drive demand due to robust cardiology systems.

Asia Pacific: China sees growth from high CVD prevalence, while Japan emphasizes elderly CHD care.



Rest of the World: Brazil expands cardiac services, and the Middle East invests in microinvasive tech.

Application Analysis

Pulmonary Stenosis: Expected growth of 4.3%-6.0%, driven by CHD cases. Trends focus on early intervention.

Pulmonary Regurgitation: Projected growth of 4.2%-5.9%, linked to post-surgical needs. Developments emphasize durability.

Pulmonary Atresia: Anticipated growth of 4.4%-6.1%, suited for complex cases. Advances prioritize precision.

Others: Expected growth of 4.1%-5.8%, covering niche uses. Trends lean toward versatility.

Type Analysis

Balloon Expanded Transcatheter Valve: Expected growth of 4.3%-6.0%, valued for reliability. Trends highlight broad adoption.

Self Expanded Transcatheter Valve: Projected growth of 4.4%-6.1%, key for anatomical flexibility. Advances focus on innovation.

Key Market Players

Leading firms include Medtronic, relaunching Harmony; Edwards Lifesciences Corporation, offering SAPIEN 3; Boston Scientific Corporation, supporting cardiac tech; Abbott Laboratories, enhancing interventions; Venus Medtech, launching VenusP-Valve; Braile Biomedica, scaling solutions; JenaValve Technology, targeting precision; Artivion, advancing CHD care; LivaNova, boosting cardiology; and MicroPort, innovating in valves.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate, due to high regulatory and capital barriers, though niche innovators can enter.



Threat of Substitutes: Moderate, as surgical valves compete, but TPVs offer unique minimally invasive benefits.

Bargaining Power of Buyers: Moderate, with facilities seeking effective, costefficient valves, though specialized needs limit options.

Bargaining Power of Suppliers: Low, with multiple material providers.

Competitive Rivalry: High, with competition on durability, flexibility, and Al integration.

Market Opportunities and Challenges

Opportunities:

CHD (1.35 million cases) and CVD (17.5 million deaths) drive demand.

Aging populations (780 million over 65) boost needs, while AI and self-expanding valves enhance adoption.

Subsidies (80% Medicare coverage) increase usage.

Challenges:

High costs limit access in low-income regions.

Regulatory delays for new valves slow growth.

Limited interventional cardiologists restrict expansion.

Market News

In January 2022, CryoLife, Inc. rebranded to Artivion, Inc.

In June 2024, Venus Medtech implanted its VenusP-Valve in the PROTEUS study.



In February 2023, Medtronic relaunched the Harmony TPV system, approved in Japan.



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