

External Pacemaker Market Forecasts to 2034 – Global Analysis By Device (Single Chamber and Dual Chamber), By Application (Acute Myocardial Infarction, Bradycardia, Heart Block and Other Applications), End User and By Geography

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Abstracts

According to Statistics MRC, the Global External Pacemaker Market is accounted for \$1.9 billion in 2026 and is expected to reach \$2.9 billion by 2034 growing at a CAGR of 5.4% during the forecast period. An external pacemaker is a medical device designed to regulate heart rhythm by delivering electrical impulses externally. It consists of electrodes connected to an external generator that emits controlled electrical signals. This device is placed on the patient's chest and transmits electrical pulses to the heart, addressing abnormal heart rhythms like bradycardia or other conduction abnormalities until a permanent solution is implemented.

According to the Centers for Disease Control and Prevention (CDC), approximately every 40 seconds an American will have a heart attack. Every year, 805,000 Americans have a heart attack, 605,000 of them for the first time.

Market Dynamics:

Driver:

Growing geriatric population

Elderly individuals commonly experience heart rhythm abnormalities like bradycardia or heart block. As the ageing demographic expands, there's a higher prevalence of cardiac conditions necessitating pacemaker intervention. External pacemakers serve as

temporary solutions in these cases, providing immediate cardiac support while patients await permanent implantation or temporary measure post-cardiac procedures. Additionally, the rising ageing population worldwide directly correlates with an increased demand for external pacemakers, fostering market growth.

Restraint:

High cost of pacemakers

These devices are crucial for cardiac management, but they involve substantial expenses for both procurement and maintenance. The sophisticated technology, materials, and manufacturing processes contribute to elevated prices. Additionally, healthcare budget constraints and limited insurance coverage in certain regions create financial barriers, hindering patient access to these life-saving devices, which limits their accessibility to a broader population.

Opportunity:

Increasing disposable income in emerging economies

Due to the rise in income levels, emerging economies can afford advanced healthcare services and devices, including pacemakers. This leads to a higher demand for cardiac care and better access to expensive medical technologies. Improved affordability allows a larger segment of the population to opt for pacemaker implantations or treatments, boosting market growth. Moreover, increased healthcare spending and better insurance coverage contribute to expanded adoption rates, creating a favourable market landscape in these economies.

Threat:

Competition from alternative therapies

Alternative treatments like medication, lifestyle changes, or other non-invasive cardiac interventions present alternatives to pacemaker implantation. For certain cardiac conditions, patients might opt for alternative therapies before considering a pacemaker due to concerns about surgery, device dependency, or cost. Moreover, advancements in non-invasive procedures and research into alternative treatments offer viable options, potentially reducing the immediate need for pacemakers.

Covid-19 Impact:

The COVID-19 pandemic had a substantial impact on the external pacemaker market. Disruptions in healthcare services, elective procedures, and hospital visits led to deferred non-emergency treatments, including pacemaker implantations. Supply chain disruptions and the prioritisation of resources for pandemic-related care affected device availability. Patient reluctance to seek medical care and hospitalisations also contributed to reduced pacemaker procedures, resulting in a temporary decline in market growth.

The hospitals segment is expected to be the largest during the forecast period

During the forecast period, the hospitals segment is poised to dominate. Hospitals serve as primary centres for cardiac care, equipped with specialised infrastructure and skilled healthcare professionals capable of diagnosing and treating complex cardiac conditions requiring external pacemakers. Additionally, these facilities often witness a high influx of patients requiring immediate cardiac interventions, making them primary hubs for pacemaker implantations and management. The comprehensive healthcare services and specialised cardiology departments in hospitals solidify their position as the largest contributors to the external pacemaker market.

The heart block segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the heart block segment is anticipated to experience a lucrative growth rate. This is attributed to the increasing prevalence of heart block conditions, where the heart's electrical signals are delayed or obstructed. External pacemakers serve as essential temporary solutions for regulating the heart's rhythm in such cases, contributing to their heightened demand. Additionally, advancements in technology and a growing awareness of cardiac health are expected to drive the adoption of external pacemakers for heart block management, fueling the segment's rapid growth.

Region with largest share:

North America is positioned to secure the largest market share in the external pacemaker market owing to its advanced healthcare infrastructure, high prevalence of cardiac disorders, and substantial healthcare expenditure. Additionally, the presence of key market players and extensive research and development activities contribute to

market dominance. Furthermore, increasing initiatives for technological advancements in cardiac care and a proactive approach to adopting innovative medical solutions reinforce North America's prominence in the external pacemaker market.

Region with highest CAGR:

The Asia-Pacific region is poised for significant growth in the external pacemaker market due to the region's rising prevalence of cardiac disorders and an expanding geriatric population. Additionally, improving healthcare infrastructure, growing awareness about advanced medical treatments, and rising disposable incomes contribute to higher adoption rates of external pacemakers. Moreover, collaborations with international medical device manufacturers and supportive government initiatives further drive market expansion, indicating substantial growth prospects for the Asia-Pacific External Pacemaker market.

Key players in the market

Some of the key players in External Pacemaker Market include Abbott Laboratories, Biotronik, Boston Scientific Corporation, Cardiac Science Corporation, Cook Medical, Galix Biomedical Instrumentation, LivaNova Plc, Medtronic, Osypka Medical GmbH, Reka Health Pte Ltd., Schiller AG, Shree Pacetronix Ltd., Spacelabs Healthcare and ZOLL Medical Corporation.

Key Developments:

In December 2023, Medtronic plc, a global leader in healthcare technology, announces that it has entered into a definitive agreement to expand its partnership with Cosmo Intelligent Medical Devices, a subsidiary of Cosmo Pharmaceuticals. This AI-driven partnership will further capitalize on the achievements already realized with the GI Genius™ intelligent endoscopy module, offering continued innovation and scalable healthcare advancements for patients and caregivers globally.

In November 2023, Boston Scientific Corporation announced the close of its acquisition of Relieva Medsystems Inc., a company that offers the only U.S. Food and Drug Administration-cleared Intrasept® Intraosseous Nerve Ablation System, a therapy to treat vertebrogenic pain that is a form of chronic low back pain. The Intrasept system, a basivertebral nerve ablation therapy, will be an addition to the Boston Scientific chronic pain portfolio that includes spinal cord stimulation, radiofrequency ablation and an interspinous spacer procedure.

In July 2023, Abbott announced that the U.S. Food and Drug Administration (FDA) has approved the AVEIR™ dual chamber (DR) leadless pacemaker system, the world's first dual chamber leadless pacing system that treats people with abnormal or slow heart rhythms. With more than 80% of people who need a pacemaker requiring pacing in two chambers of the heart (both the right atrium and right ventricle), the approval significantly increases access to leadless pacing for millions of people across the U.S.

Devices Covered:

Single Chamber

Dual Chamber

Applications Covered:

Acute Myocardial Infarction

Bradycardia

Heart Block

Post-Operative Care

Tachycardia

Other Applications

End Users Covered:

Hospitals

Ambulatory Surgical Centers

Clinics

Home Healthcare

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments

- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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