

Structural Heart Procedures Market Size, Share and Growth Outlook 2026: By Procedure Type, By Indication, By End-User, Companies to 2034

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Abstracts

The global Structural Heart Procedures Market size is forecast to increase from \$20.7 Billion in 2026 to \$38.91 Billion in 2034 at a CAGR of 8.21% between 2026 and 2034.

The Structural Heart Procedures market report provides detailed analysis and outlook of Structural Heart Procedures segments including By Procedure Type (Transcatheter Aortic Valve Replacement, Surgical Aortic Valve Replacement, Mitral Valve Repair / Annuloplasty, Transcatheter Mitral Valve Replacement, Left Atrial Appendage Closure, Septal Defect Closure, Tricuspid Valve Repair / Replacement), By Indication (Aortic Stenosis, Mitral Regurgitation / Mitral Valve Disorders, Tricuspid Regurgitation, Atrial Fibrillation, Congenital Heart Defects), By End-User (Hospitals, Ambulatory Surgical Centers (ASCs), Cardiac Catheterization Laboratories) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Structural Heart Procedures Industry Overview

Minimally invasive interventions, artificial intelligence, and novel valve technologies are transforming structural heart procedures.

The global structural heart procedures industry is advancing rapidly as cardiovascular specialists increasingly adopt minimally invasive technologies for the treatment of valvular heart disease and other complex structural cardiac conditions. Innovation is focused on improving patient selection, preserving native valve anatomy, and expanding therapeutic options for individuals who are unsuitable for conventional open-heart surgery. Artificial intelligence, transcatheter repair technologies, and non-invasive

therapeutic platforms are enhancing procedural planning, clinical decision-making, and long-term patient outcomes while supporting continued growth in structural heart interventions.

Innovative transcatheter technologies are expanding minimally invasive treatment options.

Manufacturers are developing advanced structural heart devices that improve valve repair while preserving normal cardiac function. Nyra Medical received the Jon DeHaan Foundation Award during EuroPCR 2026 for its CARLEN™ System, an innovative transcatheter mitral valve repair technology engineered to preserve native valve function while improving hemodynamic performance in patients with structural heart disease. At the same time, Cardiawave achieved the first routine European clinical use of its Valvosoft platform, which applies high-intensity ultrasound to fragment calcium deposits within stenotic aortic valves. This non-invasive approach provides an important therapeutic alternative for patients who are not suitable candidates for surgical or transcatheter valve replacement, reflecting the industry's growing emphasis on less invasive structural heart therapies.

Artificial intelligence is improving referral pathways and procedural planning.

The structural heart market is also integrating digital technologies that enable earlier diagnosis and more efficient patient management. Medtronic reported findings from the ALERT Trial, demonstrating that AI-enabled electronic clinician notifications (ECNs) significantly improve the timely identification, evaluation, and referral of patients with aortic stenosis and mitral regurgitation for transcatheter intervention. These digital decision-support tools strengthen coordination between diagnostic and interventional teams while helping appropriate patients access advanced structural heart procedures sooner. Together, developments in AI-assisted clinical workflows, transcatheter repair systems, and novel non-invasive valve therapies are accelerating the evolution of structural heart care toward more personalized, efficient, and minimally invasive treatment strategies.

Structural Heart Procedures Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Structural Heart Procedures market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and

emerging economies. Key Companies in the industry include- Abbott Laboratories, Medtronic plc, Edwards Lifesciences Corporation, Boston Scientific Corporation, W. L. Gore & Associates, Inc., LivaNova PLC, JenaValve Technology, Inc., Venus Medtech, MicroPort Scientific Corporation, Artivion, Inc.. The Structural Heart Procedures market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Structural Heart Procedures industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

Growth Structural Heart Procedures Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Structural Heart Procedures companies

Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

Detailed SWOT Analysis of global and regional Structural Heart Procedures markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Structural Heart Procedures Market Competitive Benchmarking and Company Analysis

Leading companies in Structural Heart Procedures industry include- Abbott Laboratories, Medtronic plc, Edwards Lifesciences Corporation, Boston Scientific

Corporation, W. L. Gore & Associates, Inc., LivaNova PLC, JenaValve Technology, Inc., Venus Medtech, MicroPort Scientific Corporation, Artivion, Inc.. The Structural Heart Procedures market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Structural Heart Procedures Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Structural Heart Procedures market remains one of the strongest-performing segments in the country.

The US Structural Heart Procedures Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Structural Heart Procedures market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Structural Heart Procedures industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Structural Heart Procedures markets

Canada's strong Structural Heart Procedures sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The

Canadian Structural Heart Procedures market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Structural Heart Procedures Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Structural Heart Procedures market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Structural Heart Procedures population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Structural Heart Procedures industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Structural Heart Procedures market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Structural Heart Procedures sales through 2034

France Structural Heart Procedures companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were

651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Structural Heart Procedures Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Structural Heart Procedures distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Structural Heart Procedures Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Structural Heart Procedures market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Structural Heart Procedures industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Structural Heart Procedures industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Structural Heart Procedures Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Structural Heart Procedures market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Structural Heart Procedures market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Structural Heart Procedures Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Structural Heart Procedures Market Segmentation

By Procedure Type

Transcatheter Aortic Valve Replacement

Surgical Aortic Valve Replacement

Mitral Valve Repair / Annuloplasty

Transcatheter Mitral Valve Replacement

Left Atrial Appendage Closure

Septal Defect Closure

Tricuspid Valve Repair / Replacement

By Indication

Aortic Stenosis

Mitral Regurgitation / Mitral Valve Disorders

Tricuspid Regurgitation

Atrial Fibrillation

Congenital Heart Defects

By End-User

Hospitals

Ambulatory Surgical Centers (ASCs)

Cardiac Catheterization Laboratories

Leading Companies in Structural Heart Procedures Industry (2026)

Abbott Laboratories

Medtronic plc

Edwards Lifesciences Corporation

Boston Scientific Corporation

W. L. Gore & Associates, Inc.

LivaNova PLC

JenaValve Technology, Inc.

Venus Medtech

MicroPort Scientific Corporation

Artivion, Inc.

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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Transcatheter Mitral Valve Replacement
Left Atrial Appendage Closure
Septal Defect Closure
Tricuspid Valve Repair / Replacement
By Indication
Aortic Stenosis
Mitral Regurgitation / Mitral Valve Disorders
Tricuspid Regurgitation
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