

# Defibrillator Market to Hit USD 14.85 Billion by 2032, Growing at 8.2% CAGR | SNS Insider

*Rising cardiac emergencies, technological advancements, and increasing awareness drive global defibrillator market expansion through 2032.*

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According to Research by SNS Insider, The [Defibrillator Market](#) was valued at USD 7.31 billion in 2023 and is expected to reach USD 14.85 billion by 2032, growing at a steady rate of 8.2% from 2024 to 2032. This growth is

fueled by increasing cases of cardiovascular diseases, advancements in defibrillator technology, and the rising demand for life-saving cardiac devices. The growing aging population, coupled with lifestyle-related factors such as obesity and hypertension, has significantly increased the incidence of heart-related conditions, further driving market expansion.

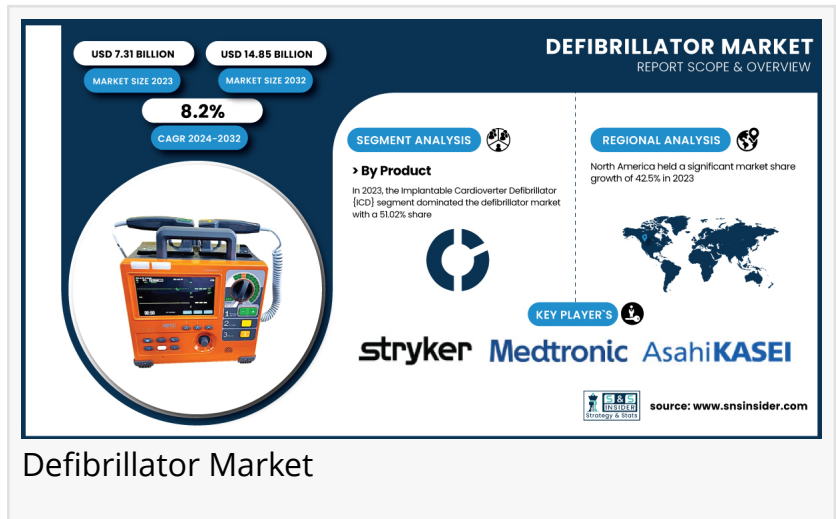
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## Market Segmentation

In 2023, the Implantable Cardioverter Defibrillator (ICD) segment emerged as the dominant force in the defibrillator market, accounting for 51.02% of the market share.

The growing demand for ICDs is due to their capacity to deliver shock automatically to avert cardiac arrest suddenly, lowering mortality rates among high-risk subjects. Moreover, advances in device miniaturization and battery life have improved patient comfort and device reliability. High success rates of ICDs in averting lethal arrhythmias and vast use in hospitals have also positively contributed to their market dominance.

The most rapidly expanding segment in the defibrillator market is the Wearable Cardioverter Defibrillator (WCD) segment. Wearable defibrillators are picking up steam because they are non-invasive and can continuously monitor the heart for high-risk patients who are not yet suitable



Defibrillator Market

candidates for an implantable device. Increasing knowledge regarding the prevention of sudden cardiac arrest and the necessity of interim protection are fueling demand for WCDs. The expanding availability of lightweight, convenient, and easy-to-use WCDs has also driven faster adoption, particularly among patients who have recently experienced cardiac events.

By Patient Type, the adult segment held the largest share of the defibrillator market in 2023, accounting for 53.04% of the total market.

The large incidence of cardiovascular diseases in adults, particularly in the elderly population, has been a major force behind this dominance. The increasing burden of lifestyle disorders, including hypertension and obesity, also adds to the demand for defibrillators among adult patients. Increased awareness of preventive healthcare practices and regular screening programs have also resulted in early diagnosis and treatment, further boosting market growth.

Conversely, the pediatric market is growing at the most rapid pace. The growing awareness of congenital heart ailments and the requirement for specialized defibrillators for children are driving the market growth. Trends in pediatric cardiac treatment and enhanced infant survival rates for children with cardiac diseases are likely to drive further growth in this segment. Healthcare organization efforts to create customized pediatric defibrillator products and make higher-level care more accessible have contributed significantly to growth in this segment.

By End User, Hospitals remained the primary end users of defibrillators in 2023, capturing a significant 79.9% of the market share.

The presence of competent healthcare personnel, well-facilitated centers, and a growing number of hospital admissions for cardiac emergencies have played a pivotal role in their dominance. The amalgamation of defibrillators within advanced cardiac units continues to solidify their supremacy. Hospitals are also increasingly using automated external defibrillators (AEDs) to expedite intervention during cardiac emergencies and enhance patients' survival rates.

In contrast, ambulatory surgical centers (ASCs) are the most rapidly growing end-user segment. The increasing trend toward outpatient procedures and the growing need for cost-efficient and speedy cardiac interventions are fueling the use of ASCs. Advances in technology making defibrillators portable and user-friendly are making them increasingly appropriate for use in these centers. The increasing demand for same-day procedures reduced healthcare expenditure, and better patient outcomes are also further enhancing the use of defibrillators in ASCs.

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## Regional Insights

North America accounted for 42.5% of the global defibrillator market share in 2023 and is

projected to maintain its dominance during the forecast period.

The region's dominance is powered by advanced healthcare infrastructure, excellent awareness of cardiac health, and the availability of market leaders. Furthermore, favorable reimbursement policies and government support have also augmented growth in the market. The high prevalence of cardiac disorders, growing investments in research and development, and the quick uptake of technologically enhanced defibrillators are some of the prime factors fueling the region's continued dominance.

On the other hand, the Asia-Pacific is the most rapidly expanding market for defibrillators. The reasons include an aging population, growing healthcare spending, and a rising incidence of cardiovascular diseases driving demand. China and India are seeing fast-paced adoption of defibrillator technologies due to increasing healthcare access and enhanced emergency response systems. The rising dominance of major market participants, increased focus on preventive care, and government-driven healthcare programs are further propelling market growth in the region.

#### Key Players in the Market:

- Medtronic
- Stryker
- Koninklijke Philips N.V.
- Asahi Kasei Corporation
- Boston Scientific Corporation
- Abbott
- MicroPort Scientific Corporation
- Nihon Kohden Corporation
- Shenzhen Comen Medical Instruments Ltd.
- BIOTRONIK SE & Co. KG
- Metrax GmbH

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