

Saudi Arabia Cardiovascular Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 81 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Saudi Arabia Cardiovascular Devices Market Analysis

The Saudi Arabia Cardiovascular Devices Market size is estimated at USD 527.33 million in 2025, and is expected to reach USD 707.40 million by 2030, at a CAGR of 5.21% during the forecast period (2025-2030).

A national pivot toward preventive care, mandatory private insurance, and rapid digitalization under Vision 2030 is moving demand beyond large tertiary hospitals to community clinics and home settings. Therapeutic and surgical products keep their leading revenue position, yet diagnostics and monitoring devices are growing faster as care shifts upstream. Localization incentives are drawing multinational firms into joint ventures with Saudi partners, shrinking import dependence while forcing incumbents to review pricing and channel strategies. Simultaneously, structural heart technologies, AI-enabled imaging, and integrated remote monitoring solutions are opening new revenue pools, even as supply-side bottlenecks such as specialist shortages and multi-layer procurement continue to temper adoption.

Saudi Arabia Cardiovascular Devices Market Trends and Insights

Rising burden of cardiovascular disease

Ischemic heart disease has become the top mortality driver in the Kingdom, with cardiovascular conditions responsible for 42% of

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

all deaths. Diabetes prevalence of 24%, hypertension exceeding 40%, and obesity at 35.4% each accelerate device demand for both interventional and monitoring solutions. The direct economic toll, valued at USD 3.5 billion in 2016, is on track to triple by 2035, prompting hospitals and payers to emphasize early detection. These clinical realities increase uptake of integrated glucose-cardiac monitors and AI-enabled risk stratification tools. Gender gaps in disease expression also present commercial scope for female-specific stent sizes and rhythm devices. Continued epidemiological surveillance keeps pressure on suppliers to broaden product portfolios that can manage comorbid metabolic risk. /

Large-scale Vision 2030 healthcare investment

The 2024 national budget reserved SAR 260 billion (USD 69.3 billion) for health and social development. Five new hospitals with 963 cardiovascular-ready beds will open by 2025, while cluster models integrate peripheral clinics via tele-cardiology networks. These physical and digital expansions accelerate placements of cath-lab imaging, portable ultrasound, and remote patient monitoring kits. Government procurement increasingly embeds local-content clauses, encouraging multinationals to establish technical transfer agreements with Saudi factories. As infrastructure matures, high-acuity centers in Riyadh and Jeddah become referral anchors for complex structural heart and electrophysiology cases.

Fragmented hospital procurement & lengthy SFDA approval cycles

Separate supply chains for Ministry hospitals, military facilities, universities, and private networks mean vendors must negotiate multiple formularies and tender calendars. Class III-IV cardiac implants undergo extended SFDA documentation, and local language labeling adds translation steps. Despite mutual-recognition provisions with the United States and European Union, average time-to-market extends 8-14 months beyond centralized systems. Suppliers are adding field-based regulatory teams and bilingual digital submission tools to compress review cycles, yet smaller innovators still face cash-flow strain during approval wait times.

Other drivers and restraints analyzed in the detailed report include:

Mandatory private insurance / Localization of manufacturing / Shortage of cardiac electrophysiologists /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Therapeutic & surgical systems generated USD 338.5 billion in 2024, equal to 64.20% of the Saudi Arabia cardiovascular devices market. Stents, grafts, and balloon catheters dominate value, supported by steady cath-lab throughput for coronary revascularization. Drug-eluting stents outpace bare-metal alternatives because of lower restenosis risk and falling unit prices through group purchasing. Hospitals rely on multivessel PCI kits with integrated imaging probes that shorten case times. New procedural guidelines recommending fractional flow reserve assessment for borderline lesions further enlarge accessory sales. Over the outlook, hybrid operating rooms will foster cross-disciplinary adoption of valve-in-valve and thoracic aortic stent-grafting platforms.

Diagnostic & monitoring devices reached USD 118.8 billion in 2024 and will chart the highest 5.93% CAGR. Growing uptake of single-patient ECG patches and Bluetooth blood-pressure cuffs fits Vision 2030 goals for decentralized chronic-disease control. Integrated cloud dashboards that aggregate vital signs are gaining reimbursement codes under private insurance. AI-enabled handheld ultrasounds allow frontline physicians to identify ventricular dysfunction without referral delays. International suppliers partner with telehealth hubs to feed anonymized rhythm and hemodynamic data into national registries, which in turn guide

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

value-based purchasing decisions. The Saudi Arabia cardiovascular devices market size attributable to diagnostics is therefore set to close part of the historical gap with interventional tools.

The Saudi Arabia Cardiovascular Devices Market is Segmented by Device Type (Diagnostic and Monitoring Devices and Therapeutic and Surgical Devices), by Application (Coronary Artery Disease, Arrhythmia and More), by End User (Hospitals & Cardiac Centers, Ambulatory Surgical Centers and More) and Geography. The Report Offers the Value (in USD) for all the Above.

List of Companies Covered in this Report:

Medtronic / Abbott Laboratories / Boston Scientific / Edward Lifesciences / Terumo / GE HealthCare Technologies Inc. / Koninklijke Philips / Siemens Healthineers / Johnson & Johnson (Mentor/Cordis/Biosense Webster) / BIOTRONIK / Getinge AB (Maquet) / Cook Group / W. L. Gore & Associates / MicroPort / Lepu Medical / B. Braun / LivaNova / Meril Life Science /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

1 Introduction

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Rising Burden of Cardiovascular Diseases in Saudi Arabia

4.2.2 Large-scale Government Investments under Saudi Vision 2030 in Cardiac Care Infrastructure

4.2.3 Mandatory Private-Sector Health Insurance Boosting Procedure Volumes

4.2.4 Localization Initiatives Favouring In-Kingdom Medical-Device Manufacturing

4.2.5 Growing Medical-Tourism Inflow for Complex Cardiac Interventions

4.2.6 Rapid Uptake of Transcatheter Therapies Driven by Hybrid Cath-Lab Expansion

4.3 Market Restraints

4.3.1 Fragmented Hospital Procurement & Lengthy SFDA Approval Cycles

4.3.2 Shortage of Cardiac Electrophysiologists

4.3.3 High Price Sensitivity among Public Hospitals Limiting ASPs

4.3.4 Cultural Barriers Delaying Early Diagnosis in Women

4.4 Value / Supply-Chain Analysis

4.5 Regulatory Outlook

4.6 Technological Outlook

4.7 Porter's Five Forces

4.7.1 Bargaining Power of Suppliers

4.7.2 Bargaining Power of Buyers

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.7.3 Threat of New Entrants

4.7.4 Threat of Substitutes

4.7.5 Competitive Rivalry

5 Market Size & Growth Forecasts (Value)

5.1 By Device Type

5.1.1 Diagnostic & Monitoring Devices

5.1.1.1 ECG Systems

5.1.1.2 Remote Cardiac Monitor

5.1.1.3 Cardiac MRI

5.1.1.4 Cardiac CT

5.1.1.5 Echocardiography / Ultrasound

5.1.1.6 Fractional Flow Reserve (FFR) Systems

5.1.2 Therapeutic & Surgical Devices

5.1.2.1 Coronary Stents

5.1.2.1.1 Drug-Eluting Stents

5.1.2.1.2 Bare-Metal Stents

5.1.2.1.3 Bioresorbable Stents

5.1.2.2 Catheters

5.1.2.2.1 PTCA Balloon Catheters

5.1.2.2.2 IVUS/OCT Catheters

5.1.2.3 Cardiac Rhythm Management

5.1.2.3.1 Pacemakers

5.1.2.3.2 Implantable Cardioverter Defibrillators

5.1.2.3.3 Cardiac Resynchronization Therapy Devices

5.1.2.4 Heart Valves

5.1.2.4.1 TAVR/TAVI

5.1.2.4.2 Mechanical Valves

5.1.2.4.3 Tissue/Bioprosthetic Valves

5.1.2.5 Ventricular Assist Devices

5.1.2.6 Artificial Hearts

5.1.2.7 Grafts & Patches

5.1.2.8 Other Cardiovascular Surgical Devices

5.2 By Application

5.2.1 Coronary Artery Disease

5.2.2 Arrhythmia

5.2.3 Heart Failure

5.2.4 Structural Heart Disease

5.2.5 Hypertension

5.2.6 Others

5.3 By End-User

5.3.1 Hospitals

5.3.2 Home-Care Settings

5.3.3 Others

6 Competitive Landscape

6.1 Market Concentration

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)

6.4.1 Medtronic plc

6.4.2 Abbott Laboratories

6.4.3 Boston Scientific Corporation

6.4.4 Edwards Lifesciences Corporation

6.4.5 Terumo Corporation

6.4.6 GE HealthCare Technologies Inc.

6.4.7 Philips Healthcare

6.4.8 Siemens Healthineers AG

6.4.9 Johnson & Johnson (Mentor/Cordis/Biosense Webster)

6.4.10 Biotronik SE & Co. KG

6.4.11 Getinge AB (Maquet)

6.4.12 Cook Medical LLC

6.4.13 W. L. Gore & Associates

6.4.14 MicroPort Scientific Corporation

6.4.15 Lepu Medical Technology

6.4.16 B. Braun Melsungen AG

6.4.17 LivaNova PLC

6.4.18 Meril Life Sciences Pvt Ltd

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Saudi Arabia Cardiovascular Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 81 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

