

## **Defibrillator - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

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### **Report description:**

Defibrillator Market Analysis

The defibrillator market is expected to grow from USD 14.61 billion in 2025 to USD 15.65 billion in 2026 and is forecast to reach USD 22.05 billion by 2031 at 7.1% CAGR over 2026-2031. Sustained incidence of sudden cardiac arrest, rapid adoption of AI-enabled devices, and wider public-access programs keep demand resilient despite supply-chain headwinds. Device makers are lengthening battery life, embedding cloud connectivity, and leaning on predictive analytics to differentiate. Payers and regulators in high-income countries increasingly reimburse cloud monitoring, while emerging markets boost baseline healthcare outlays to narrow treatment gaps. Competitive intensity rises as innovators secure FDA clearances for extravascular implantation and patch-based wearables, signaling a new product cycle poised to accelerate the defibrillator market over the next five years.

Global Defibrillator Market Trends and Insights

Rising Prevalence of Cardiovascular Diseases

Cardiovascular conditions drive two-thirds of deaths across Asia-Pacific, prompting governments to scale emergency response capacity and underpinning sustained growth of the defibrillator market. Ischemic heart disease mortality climbs even as cardiomyopathy prevalence lags Western levels, underscoring unmet prevention needs and stimulating long-run device demand. Regional health budgets rise faster than the OECD mean, though outlays still average only USD 600 per person, offering significant headroom for defibrillator penetration. Aging demographics and accelerated urban lifestyles heighten arrhythmic risk,

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further cementing long-term volume expansion. Workforce training gaps amplify the opportunity: in China only 17.5% of nurses report adequate AED knowledge, pointing to parallel demand for education and hardware .

### Technological Advancements in ICDs and AEDs

FDA approval of Medtronic's Aurora EV-ICD in 2023 shifted the defibrillator market toward extravascular implantation that avoids venous complications yet delivers antitachycardia pacing, achieving 98.7% effectiveness. Battery longevity extends about 60%, improving lifetime economics for providers and patients. AI algorithms now curtail false alarms; Element Science's Jewel Patch wearable won clearance in 2025 after demonstrating high compliance and low inappropriate-shock rates. Modular architectures gain traction, with Boston Scientific reporting 97.5% complication-free performance for its leadless-pacemaker/defibrillator combination. Collectively these innovations reinforce premium pricing and stimulate replacement demand, supporting mid-single-digit unit growth across the defibrillator market.

### Stringent Multi-Region Regulatory Frameworks

The EU Medical Device Regulation (MDR 2017/745) obliges recertification of legacy products, with half of manufacturers planning portfolio cuts and roughly one-third of devices slated for exit owing to cost and timeline burdens. ZOLL's sequential MDR approvals for its AED line illustrate the added year or more now needed for market entry. Across the Atlantic the U.S. Food and Drug Administration requires software bills of materials and vulnerability reporting for "cyber devices," adding documentation layers that elongate clearance cycles. Divergent rule sets compel dual certification efforts, straining budgets and slowing innovation throughput in the defibrillator market.

Other drivers and restraints analyzed in the detailed report include:

Expansion of Public-Access Defibrillation Programs  
AI-Enabled Wearable Defibrillators Bridge Post-MI Care Gaps  
High Total Cost of ICD Implantation & Follow-Ups

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

### Segment Analysis

Implantable cardioverter defibrillators held 71.02% of defibrillator market share in 2025, reaffirming physician familiarity and robust clinical evidence. Adoption benefits from Medtronic's extravascular approach, which not only eliminates venous leads but also extends battery life, fostering replacement demand and enlarging the defibrillator market size for implantables. Subcutaneous systems, now feasible even in toddlers, widen addressable populations. Cardiac resynchronization therapy defibrillators integrate ultrasound-based pacing and promise lower complication loads, supporting steady growth among heart-failure cohorts.

External defibrillators, while contributing a smaller base, are projected to compound at 7.64% through 2031, reflecting public-access expansion and AI-driven form factors. Wearable cardioverter units such as the FDA-cleared Jewel Patch enhance compliance by suppressing nuisance alarms and enabling barefoot therapy, factors that deepen user adoption. Drone-delivered automated external devices could raise survival from 34% higher four-minute response improvement scenarios, underscoring logistical innovation now shaping the defibrillator market. The segment also gains from subscription models that bundle connectivity, maintenance, and analytics, making budgeting predictable for municipalities and enterprises.

The Defibrillator Market Report is Segmented by Product (Implantable Cardioverter Defibrillator, and More), End User (Hospitals & Cardiac Centers, Home Care Settings, Other End Users), Patient Type (Adult Patients, Pediatric Patients), and Geography (North

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America, Europe, Asia-Pacific, Middle East & Africa, South America). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

## Geography Analysis

North America led with 43.85% of defibrillator market share in 2025, supported by integrated emergency systems and reimbursement clarity. King County's 5,000-plus registered AEDs linked to dispatch exemplify best-practice public-access integration. The FDA's prompt clearance of innovations like the Aurora EV-ICD and Jewel Patch cultivates early adoption, reinforcing regional leadership. Drone pilots in North Carolina cut response times to 4 minutes, hinting at further survival gains once scaled.

Europe sustains moderate growth as MDR compliance stabilizes. Although roughly one-third of devices risk discontinuation, successful certifications such as ZOLL's AED line prove that committed manufacturers can navigate the process. Remote monitoring uptake remains uneven: Germany and the UK reimburse connectivity, whereas Belgium and Spain lag, tempering defibrillator market penetration. Netherlands-based drone-AED projects highlight technological enthusiasm, and mandated installations in South Australia mirror the regulatory push for accessibility.

Asia-Pacific exhibits the highest CAGR at 8.21%, propelled by healthcare expenditure growth above OECD averages despite lower baseline spends. Training deficits are sizable-only 17.5% of Chinese nurses feel AED-ready-but national curricula and corporate upskilling initiatives aim to bridge gaps [DOI.ORG]. ICD adoption still trails Western benchmarks due to cost constraints, yet expanding insurance coverage and local manufacturing-e.g., MicroPort's European catheter rollout-should ease affordability and bolster the defibrillator market. Venture funding volatility poses a short-term challenge, but demographic shifts and policy support suggest durable demand through 2031.

## List of Companies Covered in this Report:

Abbott Laboratories Boston Scientific Medtronic Koninklijke Philips ZOLL Medical Corp. (Asahi Kasei) Stryker Corp. (Physio-Control) BIOTRONIK Nihon Kohden LivaNova MicroPort CRM Kestra Medical Technologies Mindray Defibtech Cardiac Science Bexen Cardio Schiller CU Medical Systems Inc. Element Science

## Additional Benefits:

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

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