

Cardiac Monitoring & Cardiac Rhythm Management (CRM) Market [ECG, Implantable Loop Recorder, Holter, Implantable Cardioverter Defibrillator (ICD), Automated External Defibrillator (AED), Pacemaker, CRT-D, CRT- P] - Global Forecasts to 2017

Description: The cardiac monitoring and cardiac rhythm management devices market is divided into two segments, namely, conventional monitoring devices and cardiac rhythm management (CRM) devices; the market is forecast till 2017. Over the years, these devices have evolved greatly from traditional monitoring devices to smaller ones with enhanced utility, sensitivity, automation, and performance.

The global cardiac monitoring and cardiac rhythm management market was worth \$18.4 billion in the year 2012. Increasing incidence of cardiovascular diseases, technological advancement, rising cost of cardiac disease treatment, and government regulations in favor of cardiac monitoring are accelerating the growth of conventional monitors as well as CRM devices. However, the economic slowdown and unstable reimbursement policies will hamper the growth of this market, to a certain extent.

Mobile cardiac telemetry, ECG data management systems, and remote patient monitoring represents vast opportunities for key players in this market. With the introduction of mobile telemetry and remote monitoring in the cardiac field, the use of home and ambulatory services is also on the rise. In 2010, there were an estimated 2.2 million users for remote patient monitoring in the U.S. alone; and this number is set to increase threefold to 6 million by 2016. ECG data management systems currently represent worldwide growth opportunity of approximately \$130 million.

The CRM devices market faced certain challenges in the recent past, owing to research studies published in the Journal of the American Medical Association (JAMA) and hospital investigations conducted by the Department of Justice (DOJ), which reported the inappropriate use of these devices. This affected the sales of CRM devices. The defibrillators and pacemakers markets showed flat growth rates in the U.S. from 2009 to 2011. However, with the technological advancements such as introduction of MRI pacemakers, subcutaneous ICDs, and home automated external defibrillators (AEDs), this market is expected to bounce back.

The geographies covered in this study are North America, Europe, Asia and Rest of the world (RoW). These four regions are further segmented by major countries and geographic split for all the sub-segments is presented at the regional level. North America is the largest market for cardiac monitoring and cardiac rhythm management, followed by Europe and Asia. North America and Europe is expected to grow at a slower pace primarily due to the economic slowdown and market maturity. The Asian market, especially India and China, is expected to witness a boost in demand for cardiac monitoring and CRM products and is poised to register maximum growth over the next five years, owing to the rising incidence of cardiovascular diseases and increased purchasing power of patients.

Scope of the Report

This research report categorizes the global cardiac monitoring and cardiac rhythm management devices market into conventional monitoring devices and cardiac rhythm management (CRM) devices. These markets are broken down into segments and sub-segments, providing exhaustive value analysis for 2010, 2011 and 2012, as well as forecast up to 2017. Each of the devices market is comprehensively analyzed at a granular level by geography (North America, Europe, Asia, and Rest of the World) to provide in-depth information on the global scenario. These regions are further analyzed at major country levels.

Global cardiac monitoring and cardiac rhythm management (CRM) devices market, by segment

Conventional Cardiac Monitoring Devices
Cardiac Rhythm Management (CRM) Devices

Conventional Cardiac Monitoring Devices

- Electrocardiogram (ECG)
- Holter Monitor
- Event Monitor
- Implantable Loop Recorder
- Cardiac Output Monitoring Devices

Cardiac Rhythm Management (CRM) Devices

- Defibrillators
- Implantable Defibrillators
- External Defibrillators
- Pacemakers
- Cardiac Resynchronization Therapy Devices

End-user market

- Hospital
- Home/ambulatory
- Others

Geographic analysis:

North America

- U.S.
- Canada

Europe

- Germany
- France
- U.K.
- Italy
- Spain
- RoE

Asia

- Japan
- India
- China
- RoA

Rest of the World (RoW)

- Brazil
- Others

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