Prosthetic Heart Valve Market: Global Industry Analysis & Opportunity Assessment, 2016-2026

Description: Mechanical heart valve is an artificial heart valve implanted in patients suffering from indicated diseases such as aortic stenosis or mitral regurgitation. Tissue heart valves are the biological valves harvested from cow heart sac (bovine) or porcine (pig) heart valves mounted on a stent or used without a stent to replace a dysfunctional heart valve. The global prosthetic heart valve market revenue is projected to register a CAGR of 12.0% during the forecast period (2016-2026) and reach a market valuation of US$ 19.60 Bn by the end of 2026.

Rising prevalence of valvular heart disease (VHD) expected to augment market growth

Increasing occurrences of valvular heart disease (VHD) is one of the primary drivers impacting the global prosthetic heart valve market. Other factors fuelling the demand for prosthetic heart valves include regulatory approval for heart valves, integration of technological advancements, and increasing number of heart valve implantation procedures. Prosthetic heart valves are an effective alternative to cumbersome open heart surgery, and this is one of the main reasons for a global preference for prosthetic heart valves.

However, high costs associated with transcatheter heart valve products, procedure related risks and complications, and product recalls are some restraints likely to hamper the growth of the global prosthetic heart valve market over the forecast period.

Market segmentation

By Product Type
- Mechanical Heart Valves
  - Mechanical Aortic Valve
  - Mechanical Mitral Valve
- Biological/Tissue Heart Valves
  - Tissue Aortic Valve
  - Tissue Mitral Valve
- Transcatheter Heart Valves
  - Transcatheter Aortic Valve
  - Transcatheter Mitral Valve

By End User
- Hospitals
- Ambulatory Surgery Centres

By Region
- North America
- Latin America Excluding Brazil
- Brazil
- Western Europe
- Eastern Europe
- Asia Pacific Excluding Japan (APAC)
- Middle East & Africa (MEA)

Tissue Heart Valves product type segment expected to dominate the global prosthetic heart valve market in terms of value

The Tissue Heart Valves segment is anticipated to register a CAGR of 12.2% during the forecast period. The Transcatheter Heart Valves segment accounted for 27.2% value share of the global prosthetic heart valve market in 2015 and is estimated to account for over 31.0% revenue share of the global prosthetic heart valve market by the end of 2026.

Hospitals end user segment likely to project increased revenue growth during the forecast period
The Hospitals segment is anticipated to be valued at US$ 4,717.2 Mn by the end of 2016 and register a CAGR of 12.2% over the forecast period to reach a market valuation of US$ 14.9 Bn by the end of 2026. The Hospitals segment is projected to remain dominant in the global prosthetic heart valve market in terms of value over the forecast period, attributed to a large number of cardiac patients opting for hospitals to undergo treatment.

North America, Western Europe, and APEJ expected to be the fastest growing regional markets throughout the forecast period.

North America and Western Europe accounted for over half the revenue share of the global prosthetic heart valve market in 2015. The North America prosthetic heart valve market accounted for a market share of 41.0% in 2015 and is expected to retain its dominance in terms of revenue in the global prosthetic heart valve market throughout the forecast period.

Increased THV procedures coupled with rising adoption of technological advancements in an effort to reduce treatment duration for high conventional surgical risk patients is expected to result in significant growth of the global prosthetic heart valve market in North America. The Western Europe prosthetic heart valve market is expected to account for the second largest market value share owing to product maturity and increased awareness levels among the population in the region.

Prosthetic heart valve market

Leading market players are concentrating on providing differentiated treatment options to patients to retain market share.

Edwards Lifesciences Corporation, St. Jude Medical, Inc., Medtronic plc, Boston Scientific Corporation, Abbott Laboratories, SYMETIS, LivaNova PLC, CryoLife, Inc., Braile Biomedica, Colibri Heart Valve LLC, and JenaValve Technology, Inc. are some of the leading players operating in the global prosthetic heart valve market. Top companies are focussing on delivering differentiated therapies to cardiac patients and are strengthening their foothold in the global prosthetic heart valve market through strategic collaborations and acquisitions.

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