

# Defibrillators

## ANMD-MRS4-034 · Medical Devices & Diagnostics

### A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

## WHY THIS REPORT

Defibrillators restart hearts in sudden cardiac arrest and protect high-risk patients, turning a leading cause of death into a survivable event. This decision-grade study sizes the global market three ways — value, units and installed base — across device type, technology and clinical application, across seven regions and four scenarios to 2032, with outlooks to 2050.

## SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond performance, defibrillators deliver measurable lives saved, sudden-cardiac-death protection and broader public-access coverage, while wider public-access coverage strengthens the healthcare-equity story.

### Mapped Sustainable Development Goals:

<b>SDG 3</b> Good Health	<b>SDG 9</b> Industry & Innovation	<b>SDG 10</b> Reduced Inequalities
-----------------------------	---------------------------------------	---------------------------------------

### Measurable sustainability outcomes assessed:

- Lives saved and sudden-cardiac-death protection
- Remote-monitored, connected cardiac care
- Broader public-access defibrillation coverage
- Device energy, e-waste, equitable access and patient-data privacy as material risks

**Framework alignment:** Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

## WHAT'S INSIDE AT A GLANCE

<b>53</b> Chapters	<b>9</b> Report Parts	<b>7</b> Regions Covered	<b>40+</b> Country Markets
<b>2025–32</b> Forecast Horizon	<b>4</b> Forward Scenarios	<b>25+</b> Companies Profiled	<b>3</b> SDGs Mapped

## REPORT COVERAGE

**Geographic scope:** North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America is the value leader (United States, Canada) on adoption and reimbursement; Europe is the technology leader (Germany, France, United Kingdom) on device industry and MDR; Asia Pacific is the scale engine; other regions assessed on their own merits.

## MARKET OVERVIEW

**From established adoption to connected care — where cardiac resuscitation goes public-access, subcutaneous and wearable.**

The defibrillators market is moving from established adoption to next-generation, connected care. Demand is driven by rising cardiac-disease burden and ageing converging with technology and access pressure, supported by strong momentum across North America, Europe and Asia Pacific. The market is read three ways — value, units and installed base — and forecast under four scenarios, each region reported separately.

- **North America is the value leader** — United States and Canada, on AED density and reimbursement
- **Europe is the technology leader** — Germany, France and United Kingdom, on CRM industry and MDR
- **Asia Pacific is the scale engine** — China, Japan and India, on access expansion and ageing
- **Clinical outcomes are the differentiator** — better survival and access plus connected, AI-enabled care

## REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Value leader	United States, Canada — adoption rates, reimbursement
Europe	Technology leader	Germany, France, United Kingdom — device industry, MDR
Asia Pacific	Scale engine	China, Japan, India — access expansion, ageing
Middle East	High-growth	Saudi Arabia, UAE — healthcare investment
Latin America	Emerging	Brazil, Mexico — healthcare expansion
Africa	Emerging	South Africa, Egypt — access, healthcare

## KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> <li>• Sudden-cardiac-death + public-access convergence</li> <li>• Patient-outcome &amp; survival improvement</li> <li>• Policy &amp; reimbursement support (FDA, CE-MDR, coverage)</li> <li>• Provider efficiency, throughput &amp; cost economics</li> <li>• AI, miniaturisation, connectivity &amp; imaging gains</li> </ul>	<ul style="list-style-type: none"> <li>• Capital cost &amp; reimbursement uncertainty</li> <li>• Regulatory, clinical-evidence &amp; approval burden</li> <li>• Workflow integration &amp; clinician training</li> <li>• Component, supply-chain &amp; service-cost inflation</li> <li>• Data privacy, cybersecurity &amp; liability barriers</li> </ul>

## SEGMENTATION SNAPSHOT

<b>By Device Type</b>	Automated external (AED) · manual / hospital · implantable (ICD) · subcutaneous (S-ICD) · wearable (WCD)
<b>By Technology</b>	External · transvenous implantable · subcutaneous / wearable
<b>By Application</b>	Public-access & EMS · hospital & critical care · implantable protection
<b>By End User</b>	Hospitals & EMS · public venues · cardiac centers · health systems
<b>By Business Model</b>	Capital & consumable · device + service · managed-care · subscription monitoring
<b>By Scale</b>	Single-site · network · national

## TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

### Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Defibrillators
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

### Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

### Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
- › Chapter 17. Middle East Market Intelligence
- › Chapter 18. Rest of World Market Intelligence

### Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

## Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

## Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

## Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

## Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

## Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

## COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans global medtech majors, specialist defibrillators makers, and emerging innovators. Deal activity — M&A, technology acquisition and platform expansion — signals a market consolidating around scalable, connected device ecosystems.

### Representative players profiled in the full report:

Abbott Laboratories · Boston Scientific Corporation · Stryker Corporation (Physio-Control) · ZOLL Medical Corporation · Koninklijke Philips N.V. · and 20+ further profiled players across category majors, specialist makers and emerging innovators.

**Investment intelligence:** venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.

## KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global defibrillators market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do clinical outcomes and access change value versus legacy devices?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the category align with the SDGs, healthcare-equity and disclosure regulation?

## WHY ANMD — THE DIFFERENCE

*Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.*

- **Triangulated sizing** — every market read three ways so value, volume and installed-base views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear Go / No-Go / Conditional-Go investment verdict.

## WHO SHOULD BUY THIS REPORT

Investors and healthcare / PE funds, medtech manufacturers and OEMs, hospitals and health systems, imaging centers and specialty clinics, clinical and procurement leaders, regulators and payers, and corporate strategy and ESG teams.

### Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com) · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

### Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com). The full detailed table of contents will be sent directly to your registered company email address.