

Defibrillation market size was ~\$4bn in 2024, with projected ~2% CAGR to 2030.
 Devices account for about 60% of the market, consumables 30% and accessories 10%.

Devices

Defibrillators can be segmented into Automated External Defibrillators (AEDs) mainly used by bystanders for treating cardiac arrest, and Advanced Life Support (ALS) used by professional medics in ambulances or hospitals.



Public access AED



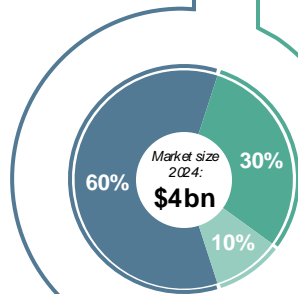
Professional AED



Hospital ALS



Transport ALS



Devices are often used for about 10 years before being replaced.

Consumables

Consumables are used in conjunction with defibrillator devices and are intended for single patient use. Most common are defibrillator pads, but others can also be for single use like SpO₂ probes, ECG electrodes, NIBP cuffs, etc. They depend on number of treated patients and represent recurring revenues for the producer.



Defibrillator pads



SpO₂ probes



ECG electrodes



NIBP cuff

Accessories

Accessories are used multiple times before being disposed. For example, batteries intended lifetime is about 5 years.



Batteries



Cables



Sensors