

Cardiac Rhythm Management Devices Worldwide

A Market Strategy Report

Report Highlights

February 2007

Report Benefits

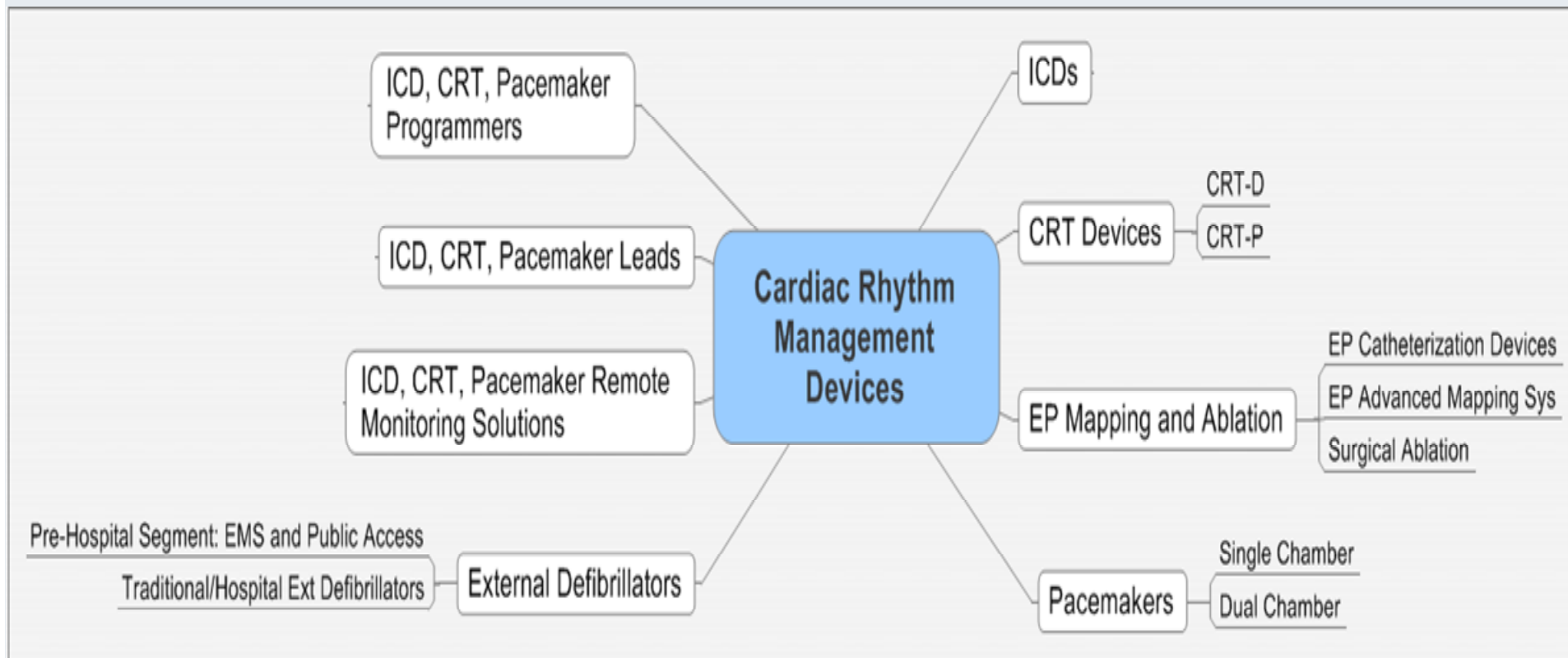
This report can help in:

- Assessing the market for Cardiac Rhythm Management Devices, growth segments, and growth regions.
- Understanding market drivers and restraints, and market segmentation.
- Strategic planning and competitive strategy.
- Identifying opportunities for partnerships and alliances.

Key Takeaways

- Marketstrat believes that the U.S. and worldwide ICD markets have rebounded. These markets are under penetrated and we see a sustainable growth opportunity in the U.S. and internationally. This optimism is partly based on the up tick in sales in the last quarter of 2006.
- Fixing quality and product issues and shoring up stakeholder confidence – these are the most critical factors determining ICD market growth in 2007.
- The EP Catheterization, Mapping and Ablation (CMA) segment presents an interesting convergence of technologies, products, and solutions. This segment will likely see consolidation as certain product/technology platforms evolve into standard of care.

CRM Devices Universe



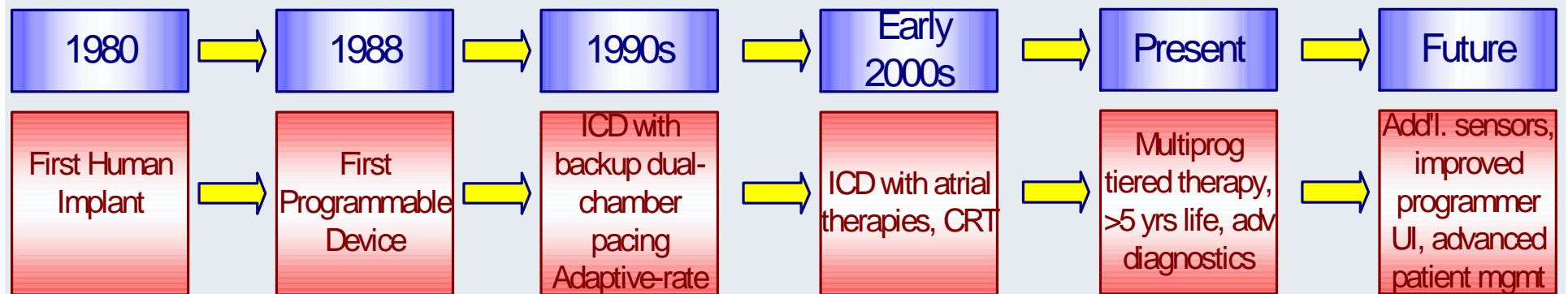
Electrophysiology/AF Drivers

- Large unmet clinical need for the diagnosis and treatment of atrial fibrillation (AF) – next only to heart failure.
- Significant economic impact and morbidity associated with untreated and under treated atrial fibrillation patients, translating into market opportunity.
- Optimal device treatment options still evolving with no established dominant player. Safety and efficacy of current medical / device therapy options questionable. According to one estimate, less than 2% of AF population is being addressed with curative therapies.
- Strong interest among electrophysiologists (EPs) and cardiac surgeons in AF therapy, particularly AF ablation clinical outcomes, and increased awareness of practice guidelines.

ICD Market Drivers

- Extensive base of scientific evidence as well as cost-effectiveness.
- Under penetrated US and international markets.
- Industry investment in clinical research, product development, and awareness campaigns to stratify patients at risk of SCA.
- Accessibility to patient population.
- Appropriate reimbursement coverage from Medicare and the managed care sector.

Evolution of ICDs



Sample Data Table

ICDs - Worldwide By Geographic Region - Revenues & Implantations (2005-2013)

Segment	2005	2006	2007	2008	2009	2010	2011	2012	2013	CAGR
UNITED STATES										
Revenues (\$ Million)										
Revenue Growth										
% of Worldwide ICD Revenues										
Unit Implantations										
Unit Implantation Growth (%)										
% of Worldwide ICD Implantations										
EUROPE										
Revenues (\$ Million)										
Revenue Growth										
% of Worldwide ICD Revenues										
Unit Implantations										
Unit Implantation Growth (%)										
% of Worldwide ICD Implantations										
JAPAN										
Revenues (\$ Million)										
Revenue Growth										
% of Worldwide ICD Revenues										
Unit Implantations										
Unit Implantation Growth (%)										
% of Worldwide ICD Implantations										
REST OF THE WORLD (ROW)										
Revenues (\$ Million)										
Revenue Growth										
% of Worldwide ICD Revenues										
Unit Implantations										
Unit Implantation Growth (%)										
% of Worldwide ICD Implantations										
TOTAL										
Revenues (\$ Million)										
Revenue Growth										
Unit Implantations										
Unit Implantation Growth (%)										

Source: Marketstrat®

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Regions Covered	USA, Europe, Japan, Rest of the World (ROW)
Product/Market Segments	ICDs – Revenues and Unit Implantations Pacemakers – Revenues and Unit Implantations CRT Devices – Revenues and Unit Implantations Electrophysiology – Revenues (Catheterization, Advanced Mapping, Surgical Ablation) External Defibrillators – Revenues (Pre-Hospital and Hospital Markets)
Companies Profiled	67 (worldwide)
Market Estimates/ Forecasts	Estimates/Forecasts for 2005-2013 in US dollars & Implantations (where applicable), separately for each region by Product Segment
MARKETSTRAT® Analytical Framework	Drivers and Restraints; Key Market Parameters (KeyMAP Grid), Market Share Rankings, Competitive Position Maps
Report Code	MSR-054
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