

Market insights summary

Japan pulse generator market

What's new?

Dual-chamber leadless pacemakers and new extravascular ICDs¹ have entered the Japanese market

- Abbott Laboratories' AVEIR DR received Japanese regulatory approval in late 2024, making it the first commercially available dual-chamber leadless pacemaker in Japan. It facilitates pacing in both the right atrium and right ventricle, which is expected to significantly increase patient access to leadless pacing.
- Medtronic's Aurora EV-ICD device was launched in Japan in March 2025. It has the advantage of not requiring the use of transvenous leads, while also providing antitachycardia pacing and a greater battery life than subcutaneous ICDs, which is expected to expand the eligible patient population for extravascular ICDs.

MHLW² biennial reimbursement cuts are limiting device prices while incentivizing innovation

- As with many medical device markets in Japan, reimbursement cuts under the MHLW's foreign average pricing policy are resulting in downward pricing pressure in the pulse generator market. This results in cuts to reimbursement every two years for certain devices, limiting market revenue growth over the long term.
- However, devices with innovative features are eligible for a 5-10% reimbursement premium, incentivizing companies to introduce their most innovative products in Japan as early as possible. Medtronic's Aurora device is an example of a device that received such a premium due to its innovative features.

**Access more insights and data in the [report](#).
Speak to our team to see how we can power your innovation.**

¹ICDs = Implantable Cardioverter Defibrillators

²MHLW = Ministry of Health, Labour and Welfare

*CRTs = Cardiac Resynchronization Therapies

2024 Japan pulse generator market snapshot

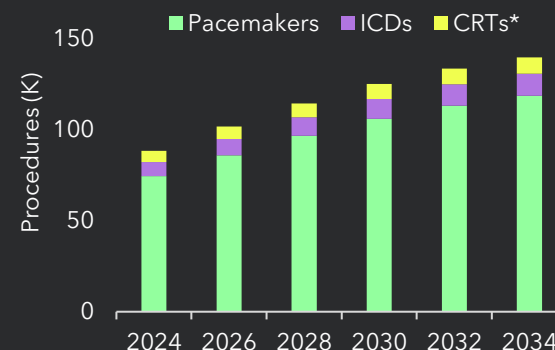
\$474M

Market value

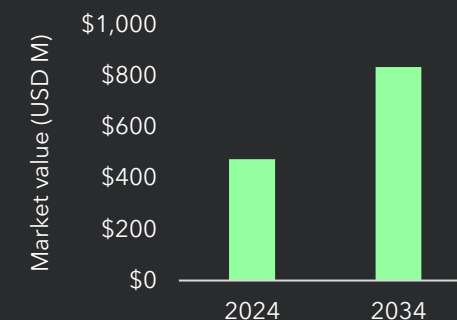
4.2%

CAGR (2019-2034)

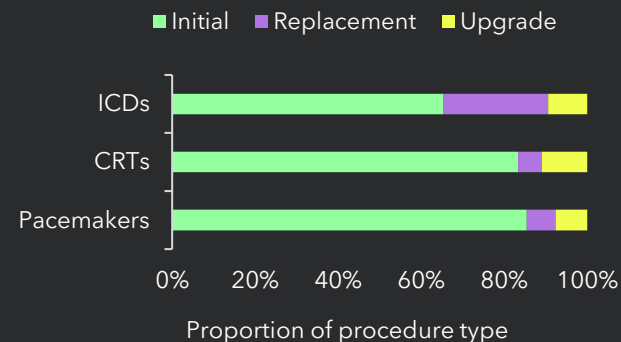
Japan pulse generator procedures by product type



Japan pulse generator market value



Japan pulse generator procedure type proportions for each product type



2024 Japan pulse generator revenue market shares

