

## Market Insights Summary

# U.S. pulsed-field ablation market

## What's trending and new

### 01. PFA<sup>1</sup> is increasingly moving toward hospital outpatient and ASC<sup>2</sup> settings

- From January 1, 2026, the CMS<sup>3</sup> has approved reimbursement for cardiac ablation procedures in ASCs, supporting a migration of these procedures into the outpatient setting. The signals an ongoing shift of increasingly complex procedures into ASCs.
- PFA workflows are becoming increasingly efficient, with new options for integrated mapping and ablation catheters, as well as dual-energy catheters, making it an ideal procedure for this setting due to low procedure times and resource utilization.

### 02. PFA is expanding its reach to treat new patient populations

- PFA was initially commercialized in the U.S. for paroxysmal AF<sup>4</sup>, with FDA<sup>5</sup> approvals for Boston Scientific's FARAPULSE PFA system and Medtronic's Sphere-9 dual-energy PFA system subsequently broadening its use in persistent AF.
- Other indications, including repeat AF ablation procedures, linear lesion sets, and posterior wall isolation are expected to increase in adoption in the coming years.
- Additionally, Medtronic received breakthrough device designation for an indication expansion of its Sphere-9 PFA system in the treatment of VT<sup>6</sup> in April 2026, potentially greatly expanding the addressable population for this therapy.

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

1 = Pulsed-Field Ablation  
 2 = Ambulatory Surgical Center  
 3 = Centers for Medicare and Medicaid (US)  
 4 = Atrial Fibrillation  
 5 = Food and Drug Administration (US)  
 6 = Ventricular Tachycardia

## 2025 U.S. PFA device market snapshot

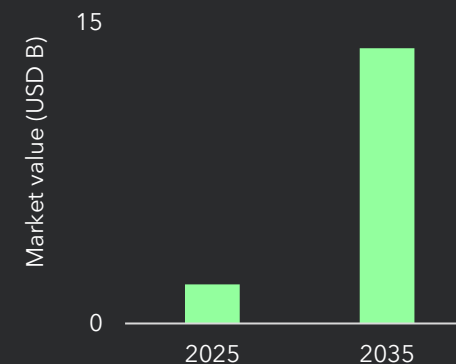
**\$1.95B**

Market revenue

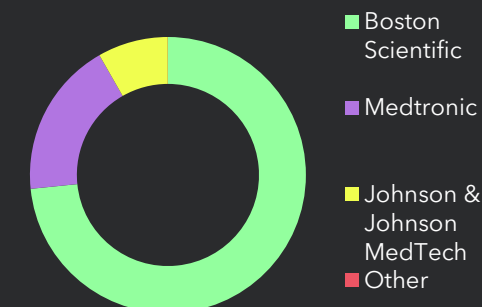
**21.8%**

CAGR ('25-'35)

### U.S. PFA market, 2025 vs. 2035



### 2025 U.S. competitive landscape



### U.S. PFA market by product type, 2025 vs. 2035

