

World External Defibrillator Market April 2004

In 2002 and 2003, Frost & Sullivan conducted two studies of the external defibrillator market. The studies examined units shipped for 2000 and 2001 in the United States and worldwide and defibrillator revenue for 2002 for the United States, Europe, and the “rest of the world.” Both studies distinguished automated external defibrillators (AEDs) from non-AEDs and the earlier study also examined market share in four distinct customer segments: Hospital/Medical, Pre-hospital (emergency services), Public Access/Corporate, and Home.

We obtained most data for these studies from interviews with defibrillator manufacturers, industry associations, and health organizations. Each final market measurement, however, represents the sum of many detailed inputs, both quantitative and qualitative, and includes insights such as market trends, challenges, drivers, and restraints.

Overall, we found that Philips is the world leader in the AED market.

- In addition to world leader in the AED market, our 2003 study found that Philips is the world leader in each of the three geographies we examined: US (42 percent), Europe (54 percent) and rest-of-the-world (56 percent).
- Based on our 2003 study, we awarded Philips Medical Systems the *2003 Technology Leadership Award* for its excellence in product innovation.
- We also awarded Philips Medical Systems the *2003 New Care Setting of the Year Award* for moving healthcare from traditional settings to a new frontier with the HeartStart Home Defibrillator.

Other key findings of our study for 2001 market share by customer segment:

- Philips is the world market share leader in hospital/alternate medical AEDs with 50 percent of units shipped
- Philips is the world market share leader in pre-hospital (EMS, EMT, and targeted first responder) AEDs with 41 percent of units shipped
- Philips is the world market share leader in the public access/corporate defibrillator market with 47 percent of units shipped
- Philips is the U.S. market share leader in the home defibrillator market with 48 percent of units shipped. (There is no home market outside the U.S.)

In addition, we found that Philips Medical is:

- ***Focused on clinical efficacy***, which can be seen in their significant clinical research investment
- ***Focused on ease-of-use*** of human interface, particularly as it relates to the specific needs of different user groups
- ***Focused on providing customers with a total solution*** (device placement, response plan, training), not just “selling boxes”

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