

Heart Lung Machine Market By Component (Oxygenator, Pump, Cannula, Monitoring System, Heat Exchange Unit, Blood Reservoir, Others) , By Application (Coronary Artery Bypass Grafting (CABG) , Heart Valve Surgeries, Heart Transplant, Lung Transplant, Others) By End User (Hospitals, Cardiac Centers, Others) : Global Opportunity Analysis and Industry Forecast, 2024-2033

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Abstracts

The global heart–lung machine market was valued at \$2.3 billion in 2023, and is projected to reach \$4.5 billion by 2033, growing at a CAGR of 6.7% from 2024 to 2033.

A heart–lung machine is a medical device used during open-heart surgery to temporarily take over the function of the heart and lungs. It maintains the circulation of blood and the oxygenation of the body when the heart is stopped or undergoing surgical intervention. This machine is essential in providing a stable blood flow, oxygenating the blood, and removing carbon dioxide from the body while the heart is not functioning. The heart–lung machine is equipped with a pump, an oxygenator, and a series of tubing to circulate blood throughout the body, ensuring that vital organs, especially the brain and kidneys, continue to receive an adequate supply of oxygen and nutrients during surgery.

The global heart–lung machine market is witnessing robust growth due to factors such as alarming rise in prevalence of cardiovascular diseases. According to a recent study published by the World Health Organization, cardiovascular diseases have been reported cause the largest disease burden worldwide, resulting in approximately 17.9

million deaths each year. This emphasizes the urgent need for advanced surgical solutions like heart–lung machines for life-saving procedures. In addition, surge in geriatric population acts as the key driving force of the global market. This is attributed to the fact that aged individuals are highly susceptible to heart-related conditions, resulting in a higher demand for surgical interventions involving heart-lung machines. A 2024 study published by the World Health Organization revealed that the number of aged individuals will increase from 1 billion in 2020 to 1.4 billion by 2030. Moreover, the number of individuals aging 80 years and older is estimated to reach 426 million by 2050. Furthermore, surge in procedures like coronary artery bypass grafting and valve replacements due to improved healthcare access and early diagnosis boosts the growth of the global market. Furthermore, rise in awareness about cardiovascular diseases, increase in availability of trained cardiothoracic surgeons, and supportive government funding for advanced medical technologies and favorable reimbursement scenarios in developed countries encourage the adoption of heart–lung machines, thus strengthening the market growth. However, complications associated with cardiopulmonary bypass, such as inflammatory responses, coagulation issues, and organ dysfunction, can pose significant risks, reducing the willingness of healthcare providers and patients to adopt the technology. Moreover, lack of adequate healthcare infrastructure acts as a key barrier to widespread adoption of these machines, thus limiting the market growth. On the contrary, innovations such as miniaturized and portable heart–lung machines, advanced oxygenators, and integrated monitoring systems enhance precision and reduce complications. Such developments are expected to open new avenues for the expansion of the global market during the forecast period.

The global heart–lung machine market is segmented into component, application, end user, and region. On the basis of component, the market is classified into oxygenator, pump, cannula, monitoring system, heat exchange unit, blood reservoir, and others. Depending on application, it is segregated into coronary artery bypass grafting, heart valve surgeries, heart transplant, lung transplant, and others. By end user, it is divided into hospitals, cardiac centers, and others. Region wise, the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

Key Findings

On the basis of component, the oxygenators segment is expected to dominate the market from 2024 to 2033.

Depending on application, the bypass grafting (CABG) segment is anticipated to exhibit

the highest growth during the forecast period.

By end user, the hospitals segment is projected to grow at a notable pace in the near future.

Region wise, North America held the largest market share in terms of revenue in 2023, and is expected to dominate the market during the forecast period.

Competition Analysis

Competitive analysis and profiles of the major players in the global heart–lung machine market include Medtronic plc, Terumo Corporation, Getinge AB, Sorin Group., LivaNova PLC, Fresenius SE & Co. KGaA, Boston Scientific Corporation, Cardinal Health, Inc., Nipro Corporation, and Asahi Kasei Corporation. These major players have adopted various key development strategies such as business expansion, new product launches, and partnerships to strengthen their foothold in the global market.

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Historic market data

Key Market Segments

By Component

Oxygenator

Pump

Cannula

Monitoring System

Heat Exchange Unit

Blood Reservoir

Others

By Application

Coronary Artery Bypass Grafting (CABG)

Heart Valve Surgeries

Heart Transplant

Lung Transplant

Others

By End User

Hospitals

Cardiac Centers

Others

By Region

North America

U.S.

Canada

Mexico

Europe

France

Germany

Italy

Spain

UK

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Australia

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

Rest of LAMEA

Key Market Players

Medtronic plc

Terumo Corporation

Getinge AB

Sorin Group.

LivaNova PLC

Fresenius SE & Co. KGaA

Boston Scientific Corporation

Cardinal Health, Inc.

Nipro Corporation

Asahi Kasei Corporation

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