

Global Cardiopulmonary Oxygenator Market: Analysis By Product Type (Membrane Oxygenator and Bubble Oxygenator), By Application (Cardiac, Respiratory, and ECPR), By Type (Reusable Oxygenator and Disposable Oxygenator), By Age Group (Adults, Pediatric, and Neonates), By End-User (Hospitals & Clinics, Ambulatory Surgical Centers, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

The global cardiopulmonary oxygenator market was valued at US\$742.12 million in 2022. The market value is expected to reach US\$926.75 million by 2028. A cardiopulmonary oxygenator is a medical device used in cardiac surgery to temporarily take over the functions of the heart and lungs. It oxygenates the patient's blood, removes carbon dioxide, and circulates the blood throughout the body while the heart is temporarily stopped during surgery.

The cardiopulmonary oxygenator market has grown in recent years due to technological advancements, demographic shifts, and expanding healthcare infrastructure. These trends are likely to persist in the forthcoming years, driven by a commitment to innovation and an aging global population with increasing healthcare needs.

Additionally, the integration of artificial intelligence and data-driven approaches in healthcare is expected to further improve patient care and surgical outcomes, which will sustain the demand for cardiopulmonary oxygenators. The market is expected to grow at a CAGR of approx. 4% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

By Product Type: The report provides the bifurcation of the market into two product types: Membrane Oxygenator and Bubble Oxygenator. The membrane oxygenator segment held the highest share of the market and is also expected to grow at the fastest rate in the years to come. The growth in demand for membrane oxygenators can be attributed to their superior performance and safety features. These devices offer a more efficient transfer of oxygen and carbon dioxide, resulting in improved patient outcomes and reduced complications during surgeries.

By Application: The report analyzed the cardiopulmonary oxygenator market based on the following applications: Cardiac, Respiratory, and ECPR. Cardiac held the highest share in the market and is expected to be the fastest-growing segment in the forecasted period. Cardiopulmonary oxygenators are widely used in cardiac surgeries, particularly during procedures like coronary artery bypass grafting (CABG) and valve replacement. They play a crucial role in maintaining oxygenation and circulation for patients while the heart is temporarily stopped. The demand for cardiopulmonary oxygenators in cardiac applications has been growing due to the increasing incidence of cardiovascular diseases.

By Type: The report analyzed market based on the following type: Reusable Oxygenator, and Disposable Oxygenator. Reusable oxygenator held the largest market share and is expected to be the fastest growing segment in the forecasted period. Reusable oxygenators are durable, sterilizable devices that can withstand multiple sterilization cycles and are typically used for a certain number of procedures before they need replacement. The growth in demand for reusable oxygenators is primarily due to their cost-effectiveness and sustainability.

By Age Group: The market has been analyzed based on the following age groups: Adult, Pediatric, and Neonates. Adults held the highest share in the market and is expected to be the fastest growing segment in the forecasted period. As the global population ages, the prevalence of cardiovascular and respiratory diseases, which often require surgical interventions, is increasing. The elderly are more susceptible to these conditions, leading to a surge in cardiac and respiratory surgeries. This, in turn, fuels the demand for cardiopulmonary oxygenators, as they are essential for maintaining oxygenation and circulation during these procedures.

By End-Use: The report provides a glimpse of the market based on end-users:

Hospitals & Clinics, Ambulatory Surgical Centers, and Others. Hospitals & Clinics held the highest share in the market. Advancements in medical technology and the availability of skilled medical professionals in hospital settings have improved the safety and success rates of cardiac and respiratory surgeries. This has further driven the need for cardiopulmonary oxygenators, making them a crucial component in hospitals' cardiac and respiratory care departments.

By Region: The report provides insight into the cardiopulmonary oxygenator market based on the regions namely, North America, Europe, Asia Pacific, Latin America, and Middle East & Africa. North America held the major share of the market in 2022. The US has a rapidly aging population, which has led to an increased prevalence of cardiovascular and respiratory diseases. According to the US Census Bureau, in 2020, about 1 in 6 people in the US were age 65 and over. In 1920, this proportion was less than 1 in 20. As the baby boomer generation continues to age, the demand for cardiac surgeries, lung transplants, and other procedures requiring cardiopulmonary oxygenators has risen significantly. This demographic trend is expected to persist, sustaining the demand for these devices.

In Germany, the prevalence of diabetes is expected to increase in the forthcoming years. According to the International Diabetes Federation, the prevalence of diabetes will increase from 6.9% in 2021 to 8.4% by the year 2045. The rising prevalence of diabetes is linked to an increased risk of cardiovascular disease. As diabetes-related

cardiovascular complications grow, more patients may require cardiac surgeries, leading to a higher demand for cardiopulmonary oxygenators.

As stated by Livemint, the Indian central and state governments' budgeted expenditure on healthcare touched 2.1% of GDP in the financial year 2023 and 2.2% in the financial year 2022, against 1.6% in the financial year 2021, as per the Economic Survey 2022-23 tabled in Parliament. Enhanced healthcare funding allows for improved infrastructure and access to advanced medical technology, including life-saving devices such as cardiopulmonary oxygenators, as healthcare systems strive to provide high-quality cardiac and respiratory care.

Market Dynamics:

Growth Drivers: The global cardiopulmonary oxygenator market growth is predicted to be supported by numerous growth drivers such as aging population, increasing healthcare expenditure, increasing prevalence of obesity, growing number of surgical

procedure, increasing use of portable ECMO devices, growing investment in R&D within the medtech sector, rising prevalence of cardiovascular diseases and respiratory disorder, and many other factors. With an aging global population and changing lifestyles, there has been a significant increase in the incidence of heart-related conditions and respiratory ailments. Cardiovascular diseases, including congestive heart failure, coronary artery disease, and arrhythmias, continue to be leading causes of morbidity and mortality. The surge in demand for cardiopulmonary oxygenators stems from their capacity to oxygenate the blood, remove carbon dioxide, and maintain circulation during complex surgical procedures and while patients recover from acute illnesses.

Challenges: However, the market growth would be negatively impacted by various challenges such as lack of skilled professionals, stringent rules and regulations, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as integration AI in healthcare, portability and customization of flow rate, increasing usage in neonatal and pediatric patients, technological advancements, etc. Neonatal and pediatric patients often require specialized care and life support, particularly in cases of congenital heart defects, respiratory distress, or cardiac surgery. Cardiopulmonary oxygenators are essential in providing these young patients with the necessary oxygenation and circulation support during critical procedures. As technology advances and more tailored systems are developed, cardiopulmonary oxygenators are becoming safer and more effective for use in neonatal and pediatric cases. This, in turn, has increased the confidence of healthcare providers in utilizing these devices for younger patients.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 has a positive effect on the cardiopulmonary oxygenator market growth. Initially, the pandemic led to a surge in demand for ventilators and ECMO (Extracorporeal Membrane Oxygenation) machines, which are critical components of cardiopulmonary oxygenator systems. Severely ill COVID-19 patients often experienced acute respiratory distress syndrome (ARDS), necessitating mechanical ventilation and, in some cases, ECMO support, which eventually lead to an increase in demand for cardiopulmonary oxygenator. In the post-COVID-19 era, there has been a focus on enhancing the portability and versatility of cardiopulmonary oxygenator systems.

Competitive Landscape:

The global cardiopulmonary oxygenator market is moderately consolidated. The key players in the global cardiopulmonary oxygenator market are:

Getinge
LivaNova Plc
Medtronic plc.
Fresenius Medical Care AG & Co. KGaA
Nipro Corporation (Nipro Medical Corporation)
Terumo Corporation
Eurosets
Senko Medical Instrument Mfg. Co., Ltd.
MC3 Cardiopulmonary
Braile Biomédica
Chalice Medical Ltd.

Recent collaborations between companies, research entities, and academic institutions are reshaping the cardiopulmonary oxygenator industry. The key players in the market are investing heavily in product innovation to develop new and improved cardiopulmonary oxygenators. For example, LivaNova Plc received US Food and Drug Administration (FDA) 510(k) clearance for the company's Essenz™ Heart-Lung Machine (HLM). With FDA clearance, LivaNova initiates the commercial launch of Essenz in the US. The Essenz HLM is expected to increase demand for cardiopulmonary oxygenators, as hospitals and clinics adopt the new machine.

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