

Global Extracorporeal Life Support System, ECLS Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Extracorporeal Life Support System, ECLS market size is expected to reach \$ 3086 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

Extracorporeal Life Support Systems, commonly commercialized as ECMO systems, are advanced life-support platforms used to provide temporary respiratory, cardiac, or cardiopulmonary support for patients with severe acute respiratory failure, cardiogenic shock, cardiac arrest requiring extracorporeal cardiopulmonary resuscitation, or critical-care transport needs. A typical system comprises a console or controller, centrifugal blood pump, membrane oxygenator, disposable extracorporeal circuit, cannulae, heat-exchange components, pressure and flow sensors, bubble detection, and control software. The system diverts blood from the patient, pumps it through an extracorporeal circuit for gas exchange and carbon dioxide removal, and returns it to the patient to support oxygen delivery and circulation during a period of organ recovery, bridge-to-transplant, bridge-to-decision, or other intensive-care interventions.

From an industry perspective, ECLS/ECMO systems should be viewed as high-risk, clinically embedded life-support platforms rather than ordinary extracorporeal circulation devices. The core value pool is formed by three linked layers: durable consoles and pump-control platforms, recurring disposable kits such as membrane oxygenators, pump heads, tubing sets, cannulae and sensors, and the clinical workflow required to operate the system safely in ICU, emergency, cardiac surgery and transport settings. Compared with conventional cardiopulmonary bypass equipment, ECMO/ECLS products require stronger performance in prolonged blood compatibility, alarm redundancy, bedside usability, rapid deployment and transport readiness. For this reason, the revenue model in this study uses a narrow scope and focuses on

ECMO/ECLS systems, dedicated disposables and core components.

Demand growth is shifting from pandemic-driven emergency procurement toward structural ICU capacity building, ECPR development, cardiogenic shock programs, ARDS management, inter-hospital transport and emerging-market adoption. The global clinical network reflected by ELSO cases and member centers supports the view that ECMO is becoming a recognized advanced life-support capability in major hospitals rather than a niche experimental therapy. Nevertheless, market growth is constrained by specialist staffing, anticoagulation and complication management, reimbursement, consumable cost and hospital capital budgets. As a result, a conservative mid-to-high single-digit growth outlook is more appropriate than an aggressive post-pandemic rebound scenario.

From a product roadmap perspective, future competition will center on portability, integration, extended support duration, reduced blood trauma, intelligent monitoring, and closed-loop disposable consumable ecosystems. Established platforms are advantaged by their clinical foundation and consumables systems, while new entrants are more likely to differentiate through lightweight consoles, rapid priming, transport use, and local cost advantages. The significance of Chinese domestic products lies not only in price substitution, but also in supply chain security, emergency preparedness, and local clinical adaptation. Over the next five to seven years, leading companies are expected to maintain high entry barriers, but regional markets will see more certified small-scale system and consumable suppliers. The focus of competition will shift from “whether a company can build an ECMO system” to “whether it can serve clinical use in a stable, low-risk, and scalable manner.”

This report studies the global Extracorporeal Life Support System, ECLS production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Extracorporeal Life Support System, ECLS and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Extracorporeal Life Support System, ECLS that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Extracorporeal Life Support System, ECLS total production and demand, 2021-2032, (Units)

Global Extracorporeal Life Support System, ECLS total production value, 2021-2032, (USD Million)

Global Extracorporeal Life Support System, ECLS production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Extracorporeal Life Support System, ECLS consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Extracorporeal Life Support System, ECLS domestic production, consumption, key domestic manufacturers and share

Global Extracorporeal Life Support System, ECLS production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Extracorporeal Life Support System, ECLS production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Extracorporeal Life Support System, ECLS production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Extracorporeal Life Support System, ECLS market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Medtronic plc, Abbott Laboratories, Johnson & Johnson, Fresenius Medical Care AG, Terumo Corporation, Getinge AB, LivaNova PLC, Nipro Corporation, MicroPort Scientific Corporation, Senko Medical Instrument Mfg. Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Extracorporeal Life Support System, ECLS market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Extracorporeal Life Support System, ECLS Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Extracorporeal Life Support System, ECLS Market, Segmentation by Type:

Disposables

Non-disposables

Global Extracorporeal Life Support System, ECLS Market, Segmentation by Support Mode:

VV-ECMO

VA-ECMO

Hybrid ECMO

Other

Global Extracorporeal Life Support System, ECLS Market, Segmentation by Patient Type:

Adult

Pediatric

Neonatal

Global Extracorporeal Life Support System, ECLS Market, Segmentation by Application:

Acute Respiratory Failure

Cardiogenic Shock

Cardiac Arrest / ECPR

Bridge to Recovery or Decision

Bridge to Transplant

Companies Profiled:

Medtronic plc

Abbott Laboratories

Johnson & Johnson

Fresenius Medical Care AG

Terumo Corporation

Getinge AB

LivaNova PLC

Nipro Corporation

MicroPort Scientific Corporation

Senko Medical Instrument Mfg. Co., Ltd.

Eurosets S.r.l.

Shenzhen Lifemotion Medical Co., Ltd.

Rocket Medical Co., Ltd.

Jiangsu STMed Technology Co., Ltd.

Chalice Medical Ltd.

Braile Biomédica

Key Questions Answered:

1. How big is the global Extracorporeal Life Support System, ECLS market?
2. What is the demand of the global Extracorporeal Life Support System, ECLS market?
3. What is the year over year growth of the global Extracorporeal Life Support System, ECLS market?
4. What is the production and production value of the global Extracorporeal Life Support System, ECLS market?
5. Who are the key producers in the global Extracorporeal Life Support System, ECLS market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Extracorporeal Life Support System, ECLS Introduction
- 1.2 World Extracorporeal Life Support System, ECLS Supply & Forecast
 - 1.2.1 World Extracorporeal Life Support System, ECLS Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Extracorporeal Life Support System, ECLS Production (2021-2032)
 - 1.2.3 World Extracorporeal Life Support System, ECLS Pricing Trends (2021-2032)
- 1.3 World Extracorporeal Life Support System, ECLS Production by Region (Based on Production Site)
 - 1.3.1 World Extracorporeal Life Support System, ECLS Production Value by Region (2021-2032)
 - 1.3.2 World Extracorporeal Life Support System, ECLS Production by Region (2021-2032)
 - 1.3.3 World Extracorporeal Life Support System, ECLS Average Price by Region (2021-2032)
 - 1.3.4 North America Extracorporeal Life Support System, ECLS Production (2021-2032)
 - 1.3.5 Europe Extracorporeal Life Support System, ECLS Production (2021-2032)
 - 1.3.6 China Extracorporeal Life Support System, ECLS Production (2021-2032)
 - 1.3.7 Japan Extracorporeal Life Support System, ECLS Production (2021-2032)
 - 1.3.8 Latin America Extracorporeal Life Support System, ECLS Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Extracorporeal Life Support System, ECLS Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Extracorporeal Life Support System, ECLS Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Extracorporeal Life Support System, ECLS Demand (2021-2032)
- 2.2 World Extracorporeal Life Support System, ECLS Consumption by Region
 - 2.2.1 World Extracorporeal Life Support System, ECLS Consumption by Region (2021-2026)
 - 2.2.2 World Extracorporeal Life Support System, ECLS Consumption Forecast by Region (2027-2032)
- 2.3 United States Extracorporeal Life Support System, ECLS Consumption (2021-2032)

- 2.4 China Extracorporeal Life Support System, ECLS Consumption (2021-2032)
- 2.5 Europe Extracorporeal Life Support System, ECLS Consumption (2021-2032)
- 2.6 Japan Extracorporeal Life Support System, ECLS Consumption (2021-2032)
- 2.7 South Korea Extracorporeal Life Support System, ECLS Consumption (2021-2032)
- 2.8 ASEAN Extracorporeal Life Support System, ECLS Consumption (2021-2032)
- 2.9 India Extracorporeal Life Support System, ECLS Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Extracorporeal Life Support System, ECLS Production Value by Manufacturer (2021-2026)
- 3.2 World Extracorporeal Life Support System, ECLS Production by Manufacturer (2021-2026)
- 3.3 World Extracorporeal Life Support System, ECLS Average Price by Manufacturer (2021-2026)
- 3.4 Extracorporeal Life Support System, ECLS Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Extracorporeal Life Support System, ECLS Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Extracorporeal Life Support System, ECLS in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Extracorporeal Life Support System, ECLS in 2025
- 3.6 Extracorporeal Life Support System, ECLS Market: Overall Company Footprint Analysis
 - 3.6.1 Extracorporeal Life Support System, ECLS Market: Region Footprint
 - 3.6.2 Extracorporeal Life Support System, ECLS Market: Company Product Type Footprint
 - 3.6.3 Extracorporeal Life Support System, ECLS Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Extracorporeal Life Support System, ECLS Production Value Comparison

4.1.1 United States VS China: Extracorporeal Life Support System, ECLS Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Extracorporeal Life Support System, ECLS Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Extracorporeal Life Support System, ECLS Production Comparison

4.2.1 United States VS China: Extracorporeal Life Support System, ECLS Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Extracorporeal Life Support System, ECLS Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Extracorporeal Life Support System, ECLS Consumption Comparison

4.3.1 United States VS China: Extracorporeal Life Support System, ECLS Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Extracorporeal Life Support System, ECLS Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Extracorporeal Life Support System, ECLS Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Extracorporeal Life Support System, ECLS Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Extracorporeal Life Support System, ECLS Production Value (2021-2026)

4.4.3 United States Based Manufacturers Extracorporeal Life Support System, ECLS Production (2021-2026)

4.5 China Based Extracorporeal Life Support System, ECLS Manufacturers and Market Share

4.5.1 China Based Extracorporeal Life Support System, ECLS Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Extracorporeal Life Support System, ECLS Production Value (2021-2026)

4.5.3 China Based Manufacturers Extracorporeal Life Support System, ECLS Production (2021-2026)

4.6 Rest of World Based Extracorporeal Life Support System, ECLS Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Extracorporeal Life Support System, ECLS Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Extracorporeal Life Support System, ECLS

Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Extracorporeal Life Support System, ECLS Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Extracorporeal Life Support System, ECLS Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Disposables

5.2.2 Non-disposables

5.3 Market Segment by Type

5.3.1 World Extracorporeal Life Support System, ECLS Production by Type (2021-2032)

5.3.2 World Extracorporeal Life Support System, ECLS Production Value by Type (2021-2032)

5.3.3 World Extracorporeal Life Support System, ECLS Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY SUPPORT MODE

6.1 World Extracorporeal Life Support System, ECLS Market Size Overview by Support Mode: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Support Mode

6.2.1 VV-ECMO

6.2.2 VA-ECMO

6.2.3 Hybrid ECMO

6.2.4 Other

6.3 Market Segment by Support Mode

6.3.1 World Extracorporeal Life Support System, ECLS Production by Support Mode (2021-2032)

6.3.2 World Extracorporeal Life Support System, ECLS Production Value by Support Mode (2021-2032)

6.3.3 World Extracorporeal Life Support System, ECLS Average Price by Support Mode (2021-2032)

7 MARKET ANALYSIS BY PATIENT TYPE

7.1 World Extracorporeal Life Support System, ECLS Market Size Overview by Patient

Type: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Patient Type

7.2.1 Adult

7.2.2 Pediatric

7.2.3 Neonatal

7.3 Market Segment by Patient Type

7.3.1 World Extracorporeal Life Support System, ECLS Production by Patient Type (2021-2032)

7.3.2 World Extracorporeal Life Support System, ECLS Production Value by Patient Type (2021-2032)

7.3.3 World Extracorporeal Life Support System, ECLS Average Price by Patient Type (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Extracorporeal Life Support System, ECLS Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Acute Respiratory Failure

8.2.2 Cardiogenic Shock

8.2.3 Cardiac Arrest / ECPR

8.2.4 Bridge to Recovery or Decision

8.2.5 Bridge to Transplant

8.3 Market Segment by Application

8.3.1 World Extracorporeal Life Support System, ECLS Production by Application (2021-2032)

8.3.2 World Extracorporeal Life Support System, ECLS Production Value by Application (2021-2032)

8.3.3 World Extracorporeal Life Support System, ECLS Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Medtronic plc

9.1.1 Medtronic plc Details

9.1.2 Medtronic plc Major Business

9.1.3 Medtronic plc Extracorporeal Life Support System, ECLS Product and Services

9.1.4 Medtronic plc Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.1.5 Medtronic plc Recent Developments/Updates
- 9.1.6 Medtronic plc Competitive Strengths & Weaknesses
- 9.2 Abbott Laboratories
 - 9.2.1 Abbott Laboratories Details
 - 9.2.2 Abbott Laboratories Major Business
 - 9.2.3 Abbott Laboratories Extracorporeal Life Support System, ECLS Product and Services
 - 9.2.4 Abbott Laboratories Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.2.5 Abbott Laboratories Recent Developments/Updates
 - 9.2.6 Abbott Laboratories Competitive Strengths & Weaknesses
- 9.3 Johnson & Johnson
 - 9.3.1 Johnson & Johnson Details
 - 9.3.2 Johnson & Johnson Major Business
 - 9.3.3 Johnson & Johnson Extracorporeal Life Support System, ECLS Product and Services
 - 9.3.4 Johnson & Johnson Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Johnson & Johnson Recent Developments/Updates
 - 9.3.6 Johnson & Johnson Competitive Strengths & Weaknesses
- 9.4 Fresenius Medical Care AG
 - 9.4.1 Fresenius Medical Care AG Details
 - 9.4.2 Fresenius Medical Care AG Major Business
 - 9.4.3 Fresenius Medical Care AG Extracorporeal Life Support System, ECLS Product and Services
 - 9.4.4 Fresenius Medical Care AG Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Fresenius Medical Care AG Recent Developments/Updates
 - 9.4.6 Fresenius Medical Care AG Competitive Strengths & Weaknesses
- 9.5 Terumo Corporation
 - 9.5.1 Terumo Corporation Details
 - 9.5.2 Terumo Corporation Major Business
 - 9.5.3 Terumo Corporation Extracorporeal Life Support System, ECLS Product and Services
 - 9.5.4 Terumo Corporation Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Terumo Corporation Recent Developments/Updates
 - 9.5.6 Terumo Corporation Competitive Strengths & Weaknesses
- 9.6 Getinge AB

- 9.6.1 Getinge AB Details
- 9.6.2 Getinge AB Major Business
- 9.6.3 Getinge AB Extracorporeal Life Support System, ECLS Product and Services
- 9.6.4 Getinge AB Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 Getinge AB Recent Developments/Updates
- 9.6.6 Getinge AB Competitive Strengths & Weaknesses
- 9.7 LivaNova PLC
 - 9.7.1 LivaNova PLC Details
 - 9.7.2 LivaNova PLC Major Business
 - 9.7.3 LivaNova PLC Extracorporeal Life Support System, ECLS Product and Services
 - 9.7.4 LivaNova PLC Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 LivaNova PLC Recent Developments/Updates
 - 9.7.6 LivaNova PLC Competitive Strengths & Weaknesses
- 9.8 Nipro Corporation
 - 9.8.1 Nipro Corporation Details
 - 9.8.2 Nipro Corporation Major Business
 - 9.8.3 Nipro Corporation Extracorporeal Life Support System, ECLS Product and Services
 - 9.8.4 Nipro Corporation Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Nipro Corporation Recent Developments/Updates
 - 9.8.6 Nipro Corporation Competitive Strengths & Weaknesses
- 9.9 MicroPort Scientific Corporation
 - 9.9.1 MicroPort Scientific Corporation Details
 - 9.9.2 MicroPort Scientific Corporation Major Business
 - 9.9.3 MicroPort Scientific Corporation Extracorporeal Life Support System, ECLS Product and Services
 - 9.9.4 MicroPort Scientific Corporation Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 MicroPort Scientific Corporation Recent Developments/Updates
 - 9.9.6 MicroPort Scientific Corporation Competitive Strengths & Weaknesses
- 9.10 Senko Medical Instrument Mfg. Co., Ltd.
 - 9.10.1 Senko Medical Instrument Mfg. Co., Ltd. Details
 - 9.10.2 Senko Medical Instrument Mfg. Co., Ltd. Major Business
 - 9.10.3 Senko Medical Instrument Mfg. Co., Ltd. Extracorporeal Life Support System, ECLS Product and Services
 - 9.10.4 Senko Medical Instrument Mfg. Co., Ltd. Extracorporeal Life Support System,

ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Senko Medical Instrument Mfg. Co., Ltd. Recent Developments/Updates

9.10.6 Senko Medical Instrument Mfg. Co., Ltd. Competitive Strengths & Weaknesses

9.11 Eurosets S.r.l.

9.11.1 Eurosets S.r.l. Details

9.11.2 Eurosets S.r.l. Major Business

9.11.3 Eurosets S.r.l. Extracorporeal Life Support System, ECLS Product and Services

9.11.4 Eurosets S.r.l. Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Eurosets S.r.l. Recent Developments/Updates

9.11.6 Eurosets S.r.l. Competitive Strengths & Weaknesses

9.12 Shenzhen Lifemotion Medical Co., Ltd.

9.12.1 Shenzhen Lifemotion Medical Co., Ltd. Details

9.12.2 Shenzhen Lifemotion Medical Co., Ltd. Major Business

9.12.3 Shenzhen Lifemotion Medical Co., Ltd. Extracorporeal Life Support System, ECLS Product and Services

9.12.4 Shenzhen Lifemotion Medical Co., Ltd. Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Shenzhen Lifemotion Medical Co., Ltd. Recent Developments/Updates

9.12.6 Shenzhen Lifemotion Medical Co., Ltd. Competitive Strengths & Weaknesses

9.13 Rocket Medical Co., Ltd.

9.13.1 Rocket Medical Co., Ltd. Details

9.13.2 Rocket Medical Co., Ltd. Major Business

9.13.3 Rocket Medical Co., Ltd. Extracorporeal Life Support System, ECLS Product and Services

9.13.4 Rocket Medical Co., Ltd. Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Rocket Medical Co., Ltd. Recent Developments/Updates

9.13.6 Rocket Medical Co., Ltd. Competitive Strengths & Weaknesses

9.14 Jiangsu STMed Technology Co., Ltd.

9.14.1 Jiangsu STMed Technology Co., Ltd. Details

9.14.2 Jiangsu STMed Technology Co., Ltd. Major Business

9.14.3 Jiangsu STMed Technology Co., Ltd. Extracorporeal Life Support System, ECLS Product and Services

9.14.4 Jiangsu STMed Technology Co., Ltd. Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Jiangsu STMed Technology Co., Ltd. Recent Developments/Updates

9.14.6 Jiangsu STMed Technology Co., Ltd. Competitive Strengths & Weaknesses

9.15 Chalice Medical Ltd.

- 9.15.1 Chalice Medical Ltd. Details
- 9.15.2 Chalice Medical Ltd. Major Business
- 9.15.3 Chalice Medical Ltd. Extracorporeal Life Support System, ECLS Product and Services
- 9.15.4 Chalice Medical Ltd. Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.15.5 Chalice Medical Ltd. Recent Developments/Updates
- 9.15.6 Chalice Medical Ltd. Competitive Strengths & Weaknesses
- 9.16 Braile Biom?dica
 - 9.16.1 Braile Biom?dica Details
 - 9.16.2 Braile Biom?dica Major Business
 - 9.16.3 Braile Biom?dica Extracorporeal Life Support System, ECLS Product and Services
 - 9.16.4 Braile Biom?dica Extracorporeal Life Support System, ECLS Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Braile Biom?dica Recent Developments/Updates
 - 9.16.6 Braile Biom?dica Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Extracorporeal Life Support System, ECLS Industry Chain
- 10.2 Extracorporeal Life Support System, ECLS Upstream Analysis
 - 10.2.1 Extracorporeal Life Support System, ECLS Core Raw Materials
 - 10.2.2 Main Manufacturers of Extracorporeal Life Support System, ECLS Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Extracorporeal Life Support System, ECLS Production Mode
- 10.6 Extracorporeal Life Support System, ECLS Procurement Model
- 10.7 Extracorporeal Life Support System, ECLS Industry Sales Model and Sales Channels
 - 10.7.1 Extracorporeal Life Support System, ECLS Sales Model
 - 10.7.2 Extracorporeal Life Support System, ECLS Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Extracorporeal Life Support System, ECLS Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Extracorporeal Life Support System, ECLS Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Extracorporeal Life Support System, ECLS Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Extracorporeal Life Support System, ECLS Production Value Market Share by Region (2021-2026)
- Table 5. World Extracorporeal Life Support System, ECLS Production Value Market Share by Region (2027-2032)
- Table 6. World Extracorporeal Life Support System, ECLS Production by Region (2021-2026) & (Units)
- Table 7. World Extracorporeal Life Support System, ECLS Production by Region (2027-2032) & (Units)
- Table 8. World Extracorporeal Life Support System, ECLS Production Market Share by Region (2021-2026)
- Table 9. World Extracorporeal Life Support System, ECLS Production Market Share by Region (2027-2032)
- Table 10. World Extracorporeal Life Support System, ECLS Average Price by Region (2021-2026) & (US\$/Unit)
- Table 11. World Extracorporeal Life Support System, ECLS Average Price by Region (2027-2032) & (US\$/Unit)
- Table 12. Extracorporeal Life Support System, ECLS Major Market Trends
- Table 13. World Extracorporeal Life Support System, ECLS Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)
- Table 14. World Extracorporeal Life Support System, ECLS Consumption by Region (2021-2026) & (Units)
- Table 15. World Extracorporeal Life Support System, ECLS Consumption Forecast by Region (2027-2032) & (Units)
- Table 16. World Extracorporeal Life Support System, ECLS Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Extracorporeal Life Support System, ECLS Producers in 2025
- Table 18. World Extracorporeal Life Support System, ECLS Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Extracorporeal Life Support System, ECLS Producers in 2025

Table 20. World Extracorporeal Life Support System, ECLS Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Extracorporeal Life Support System, ECLS Company Evaluation Quadrant

Table 22. World Extracorporeal Life Support System, ECLS Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Extracorporeal Life Support System, ECLS Production Site of Key Manufacturer

Table 24. Extracorporeal Life Support System, ECLS Market: Company Product Type Footprint

Table 25. Extracorporeal Life Support System, ECLS Market: Company Product Application Footprint

Table 26. Extracorporeal Life Support System, ECLS Competitive Factors

Table 27. Extracorporeal Life Support System, ECLS New Entrant and Capacity Expansion Plans

Table 28. Extracorporeal Life Support System, ECLS Mergers & Acquisitions Activity

Table 29. United States VS China Extracorporeal Life Support System, ECLS Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Extracorporeal Life Support System, ECLS Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Extracorporeal Life Support System, ECLS Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Extracorporeal Life Support System, ECLS Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Extracorporeal Life Support System, ECLS Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Extracorporeal Life Support System, ECLS Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Extracorporeal Life Support System, ECLS Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Extracorporeal Life Support System, ECLS Production Market Share (2021-2026)

Table 37. China Based Extracorporeal Life Support System, ECLS Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Extracorporeal Life Support System, ECLS Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Extracorporeal Life Support System, ECLS

Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Extracorporeal Life Support System, ECLS Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Extracorporeal Life Support System, ECLS Production Market Share (2021-2026)

Table 42. Rest of World Based Extracorporeal Life Support System, ECLS Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Extracorporeal Life Support System, ECLS Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Extracorporeal Life Support System, ECLS Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Extracorporeal Life Support System, ECLS Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Extracorporeal Life Support System, ECLS Production Market Share (2021-2026)

Table 47. World Extracorporeal Life Support System, ECLS Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Extracorporeal Life Support System, ECLS Production by Type (2021-2026) & (Units)

Table 49. World Extracorporeal Life Support System, ECLS Production by Type (2027-2032) & (Units)

Table 50. World Extracorporeal Life Support System, ECLS Production Value by Type (2021-2026) & (USD Million)

Table 51. World Extracorporeal Life Support System, ECLS Production Value by Type (2027-2032) & (USD Million)

Table 52. World Extracorporeal Life Support System, ECLS Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Extracorporeal Life Support System, ECLS Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Extracorporeal Life Support System, ECLS Production Value by Support Mode, (USD Million), 2021 & 2025 & 2032

Table 55. World Extracorporeal Life Support System, ECLS Production by Support Mode (2021-2026) & (Units)

Table 56. World Extracorporeal Life Support System, ECLS Production by Support Mode (2027-2032) & (Units)

Table 57. World Extracorporeal Life Support System, ECLS Production Value by Support Mode (2021-2026) & (USD Million)

Table 58. World Extracorporeal Life Support System, ECLS Production Value by Support Mode (2027-2032) & (USD Million)

Table 59. World Extracorporeal Life Support System, ECLS Average Price by Support Mode (2021-2026) & (US\$/Unit)

Table 60. World Extracorporeal Life Support System, ECLS Average Price by Support Mode (2027-2032) & (US\$/Unit)

Table 61. World Extracorporeal Life Support System, ECLS Production Value by Patient Type, (USD Million), 2021 & 2025 & 2032

Table 62. World Extracorporeal Life Support System, ECLS Production by Patient Type (2021-2026) & (Units)

Table 63. World Extracorporeal Life Support System, ECLS Production by Patient Type (2027-2032) & (Units)

Table 64. World Extracorporeal Life Support System, ECLS Production Value by Patient Type (2021-2026) & (USD Million)

Table 65. World Extracorporeal Life Support System, ECLS Production Value by Patient Type (2027-2032) & (USD Million)

Table 66. World Extracorporeal Life Support System, ECLS Average Price by Patient Type (2021-2026) & (US\$/Unit)

Table 67. World Extracorporeal Life Support System, ECLS Average Price by Patient Type (2027-2032) & (US\$/Unit)

Table 68. World Extracorporeal Life Support System, ECLS Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Extracorporeal Life Support System, ECLS Production by Application (2021-2026) & (Units)

Table 70. World Extracorporeal Life Support System, ECLS Production by Application (2027-2032) & (Units)

Table 71. World Extracorporeal Life Support System, ECLS Production Value by Application (2021-2026) & (USD Million)

Table 72. World Extracorporeal Life Support System, ECLS Production Value by Application (2027-2032) & (USD Million)

Table 73. World Extracorporeal Life Support System, ECLS Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Extracorporeal Life Support System, ECLS Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Medtronic plc Basic Information, Manufacturing Base and Competitors

Table 76. Medtronic plc Major Business

Table 77. Medtronic plc Extracorporeal Life Support System, ECLS Product and Services

Table 78. Medtronic plc Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 79. Medtronic plc Recent Developments/Updates
- Table 80. Medtronic plc Competitive Strengths & Weaknesses
- Table 81. Abbott Laboratories Basic Information, Manufacturing Base and Competitors
- Table 82. Abbott Laboratories Major Business
- Table 83. Abbott Laboratories Extracorporeal Life Support System, ECLS Product and Services
- Table 84. Abbott Laboratories Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. Abbott Laboratories Recent Developments/Updates
- Table 86. Abbott Laboratories Competitive Strengths & Weaknesses
- Table 87. Johnson & Johnson Basic Information, Manufacturing Base and Competitors
- Table 88. Johnson & Johnson Major Business
- Table 89. Johnson & Johnson Extracorporeal Life Support System, ECLS Product and Services
- Table 90. Johnson & Johnson Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Johnson & Johnson Recent Developments/Updates
- Table 92. Johnson & Johnson Competitive Strengths & Weaknesses
- Table 93. Fresenius Medical Care AG Basic Information, Manufacturing Base and Competitors
- Table 94. Fresenius Medical Care AG Major Business
- Table 95. Fresenius Medical Care AG Extracorporeal Life Support System, ECLS Product and Services
- Table 96. Fresenius Medical Care AG Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Fresenius Medical Care AG Recent Developments/Updates
- Table 98. Fresenius Medical Care AG Competitive Strengths & Weaknesses
- Table 99. Terumo Corporation Basic Information, Manufacturing Base and Competitors
- Table 100. Terumo Corporation Major Business
- Table 101. Terumo Corporation Extracorporeal Life Support System, ECLS Product and Services
- Table 102. Terumo Corporation Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Terumo Corporation Recent Developments/Updates
- Table 104. Terumo Corporation Competitive Strengths & Weaknesses

Table 105. Getinge AB Basic Information, Manufacturing Base and Competitors

Table 106. Getinge AB Major Business

Table 107. Getinge AB Extracorporeal Life Support System, ECLS Product and Services

Table 108. Getinge AB Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Getinge AB Recent Developments/Updates

Table 110. Getinge AB Competitive Strengths & Weaknesses

Table 111. LivaNova PLC Basic Information, Manufacturing Base and Competitors

Table 112. LivaNova PLC Major Business

Table 113. LivaNova PLC Extracorporeal Life Support System, ECLS Product and Services

Table 114. LivaNova PLC Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. LivaNova PLC Recent Developments/Updates

Table 116. LivaNova PLC Competitive Strengths & Weaknesses

Table 117. Nipro Corporation Basic Information, Manufacturing Base and Competitors

Table 118. Nipro Corporation Major Business

Table 119. Nipro Corporation Extracorporeal Life Support System, ECLS Product and Services

Table 120. Nipro Corporation Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Nipro Corporation Recent Developments/Updates

Table 122. Nipro Corporation Competitive Strengths & Weaknesses

Table 123. MicroPort Scientific Corporation Basic Information, Manufacturing Base and Competitors

Table 124. MicroPort Scientific Corporation Major Business

Table 125. MicroPort Scientific Corporation Extracorporeal Life Support System, ECLS Product and Services

Table 126. MicroPort Scientific Corporation Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. MicroPort Scientific Corporation Recent Developments/Updates

Table 128. MicroPort Scientific Corporation Competitive Strengths & Weaknesses

Table 129. Senko Medical Instrument Mfg. Co., Ltd. Basic Information, Manufacturing Base and Competitors

- Table 130. Senko Medical Instrument Mfg. Co., Ltd. Major Business
- Table 131. Senko Medical Instrument Mfg. Co., Ltd. Extracorporeal Life Support System, ECLS Product and Services
- Table 132. Senko Medical Instrument Mfg. Co., Ltd. Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. Senko Medical Instrument Mfg. Co., Ltd. Recent Developments/Updates
- Table 134. Senko Medical Instrument Mfg. Co., Ltd. Competitive Strengths & Weaknesses
- Table 135. Eurosets S.r.l. Basic Information, Manufacturing Base and Competitors
- Table 136. Eurosets S.r.l. Major Business
- Table 137. Eurosets S.r.l. Extracorporeal Life Support System, ECLS Product and Services
- Table 138. Eurosets S.r.l. Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Eurosets S.r.l. Recent Developments/Updates
- Table 140. Eurosets S.r.l. Competitive Strengths & Weaknesses
- Table 141. Shenzhen Lifemotion Medical Co., Ltd. Basic Information, Manufacturing Base and Competitors
- Table 142. Shenzhen Lifemotion Medical Co., Ltd. Major Business
- Table 143. Shenzhen Lifemotion Medical Co., Ltd. Extracorporeal Life Support System, ECLS Product and Services
- Table 144. Shenzhen Lifemotion Medical Co., Ltd. Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Shenzhen Lifemotion Medical Co., Ltd. Recent Developments/Updates
- Table 146. Shenzhen Lifemotion Medical Co., Ltd. Competitive Strengths & Weaknesses
- Table 147. Rocket Medical Co., Ltd. Basic Information, Manufacturing Base and Competitors
- Table 148. Rocket Medical Co., Ltd. Major Business
- Table 149. Rocket Medical Co., Ltd. Extracorporeal Life Support System, ECLS Product and Services
- Table 150. Rocket Medical Co., Ltd. Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. Rocket Medical Co., Ltd. Recent Developments/Updates
- Table 152. Rocket Medical Co., Ltd. Competitive Strengths & Weaknesses

Table 153. Jiangsu STMed Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 154. Jiangsu STMed Technology Co., Ltd. Major Business

Table 155. Jiangsu STMed Technology Co., Ltd. Extracorporeal Life Support System, ECLS Product and Services

Table 156. Jiangsu STMed Technology Co., Ltd. Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Jiangsu STMed Technology Co., Ltd. Recent Developments/Updates

Table 158. Jiangsu STMed Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 159. Chalice Medical Ltd. Basic Information, Manufacturing Base and Competitors

Table 160. Chalice Medical Ltd. Major Business

Table 161. Chalice Medical Ltd. Extracorporeal Life Support System, ECLS Product and Services

Table 162. Chalice Medical Ltd. Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Chalice Medical Ltd. Recent Developments/Updates

Table 164. Chalice Medical Ltd. Competitive Strengths & Weaknesses

Table 165. Braile Biomédica Basic Information, Manufacturing Base and Competitors

Table 166. Braile Biomédica Major Business

Table 167. Braile Biomédica Extracorporeal Life Support System, ECLS Product and Services

Table 168. Braile Biomédica Extracorporeal Life Support System, ECLS Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Braile Biomédica Recent Developments/Updates

Table 170. Braile Biomédica Competitive Strengths & Weaknesses

Table 171. Global Key Players of Extracorporeal Life Support System, ECLS Upstream (Raw Materials)

Table 172. Global Extracorporeal Life Support System, ECLS Typical Customers

Table 173. Extracorporeal Life Support System, ECLS Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Extracorporeal Life Support System, ECLS Picture

Figure 2. World Extracorporeal Life Support System, ECLS Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Extracorporeal Life Support System, ECLS Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Extracorporeal Life Support System, ECLS Production (2021-2032) & (Units)

Figure 5. World Extracorporeal Life Support System, ECLS Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Extracorporeal Life Support System, ECLS Production Value Market Share by Region (2021-2032)

Figure 7. World Extracorporeal Life Support System, ECLS Production Market Share by Region (2021-2032)

Figure 8. North America Extracorporeal Life Support System, ECLS Production (2021-2032) & (Units)

Figure 9. Europe Extracorporeal Life Support System, ECLS Production (2021-2032) & (Units)

Figure 10. China Extracorporeal Life Support System, ECLS Production (2021-2032) & (Units)

Figure 11. Japan Extracorporeal Life Support System, ECLS Production (2021-2032) & (Units)

Figure 12. Latin America Extracorporeal Life Support System, ECLS Production (2021-2032) & (Units)

Figure 13. Extracorporeal Life Support System, ECLS Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Extracorporeal Life Support System, ECLS Consumption (2021-2032) & (Units)

Figure 16. World Extracorporeal Life Support System, ECLS Consumption Market Share by Region (2021-2032)

Figure 17. United States Extracorporeal Life Support System, ECLS Consumption (2021-2032) & (Units)

Figure 18. China Extracorporeal Life Support System, ECLS Consumption (2021-2032) & (Units)

Figure 19. Europe Extracorporeal Life Support System, ECLS Consumption (2021-2032) & (Units)

Figure 20. Japan Extracorporeal Life Support System, ECLS Consumption (2021-2032) & (Units)

Figure 21. South Korea Extracorporeal Life Support System, ECLS Consumption (2021-2032) & (Units)

Figure 22. ASEAN Extracorporeal Life Support System, ECLS Consumption (2021-2032) & (Units)

Figure 23. India Extracorporeal Life Support System, ECLS Consumption (2021-2032) & (Units)

Figure 24. Producer Shipments of Extracorporeal Life Support System, ECLS by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Extracorporeal Life Support System, ECLS Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Extracorporeal Life Support System, ECLS Markets in 2025

Figure 27. United States VS China: Extracorporeal Life Support System, ECLS Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Extracorporeal Life Support System, ECLS Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Extracorporeal Life Support System, ECLS Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Extracorporeal Life Support System, ECLS Production Market Share 2025

Figure 31. China Based Manufacturers Extracorporeal Life Support System, ECLS Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Extracorporeal Life Support System, ECLS Production Market Share 2025

Figure 33. World Extracorporeal Life Support System, ECLS Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Extracorporeal Life Support System, ECLS Production Value Market Share by Type in 2025

Figure 35. Disposables

Figure 36. Non-disposables

Figure 37. World Extracorporeal Life Support System, ECLS Production Market Share by Type (2021-2032)

Figure 38. World Extracorporeal Life Support System, ECLS Production Value Market Share by Type (2021-2032)

Figure 39. World Extracorporeal Life Support System, ECLS Average Price by Type (2021-2032) & (US\$/Unit)

Figure 40. World Extracorporeal Life Support System, ECLS Production Value by

Support Mode, (USD Million), 2021 & 2025 & 2032

Figure 41. World Extracorporeal Life Support System, ECLS Production Value Market Share by Support Mode in 2025

Figure 42. VV-ECMO

Figure 43. VA-ECMO

Figure 44. Hybrid ECMO

Figure 45. Other

Figure 46. World Extracorporeal Life Support System, ECLS Production Market Share by Support Mode (2021-2032)

Figure 47. World Extracorporeal Life Support System, ECLS Production Value Market Share by Support Mode (2021-2032)

Figure 48. World Extracorporeal Life Support System, ECLS Average Price by Support Mode (2021-2032) & (US\$/Unit)

Figure 49. World Extracorporeal Life Support System, ECLS Production Value by Patient Type, (USD Million), 2021 & 2025 & 2032

Figure 50. World Extracorporeal Life Support System, ECLS Production Value Market Share by Patient Type in 2025

Figure 51. Adult

Figure 52. Pediatric

Figure 53. Neonatal

Figure 54. World Extracorporeal Life Support System, ECLS Production Market Share by Patient Type (2021-2032)

Figure 55. World Extracorporeal Life Support System, ECLS Production Value Market Share by Patient Type (2021-2032)

Figure 56. World Extracorporeal Life Support System, ECLS Average Price by Patient Type (2021-2032) & (US\$/Unit)

Figure 57. World Extracorporeal Life Support System, ECLS Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 58. World Extracorporeal Life Support System, ECLS Production Value Market Share by Application in 2025

Figure 59. Acute Respiratory Failure

Figure 60. Cardiogenic Shock

Figure 61. Cardiac Arrest / ECPR

Figure 62. Bridge to Recovery or Decision

Figure 63. Bridge to Transplant

Figure 64. World Extracorporeal Life Support System, ECLS Production Market Share by Application (2021-2032)

Figure 65. World Extracorporeal Life Support System, ECLS Production Value Market Share by Application (2021-2032)

Figure 66. World Extracorporeal Life Support System, ECLS Average Price by Application (2021-2032) & (US\$/Unit)

Figure 67. Extracorporeal Life Support System, ECLS Industry Chain

Figure 68. Extracorporeal Life Support System, ECLS Procurement Model

Figure 69. Extracorporeal Life Support System, ECLS Sales Model

Figure 70. Extracorporeal Life Support System, ECLS Sales Channels, Direct Sales, and Distribution

Figure 71. Methodology

Figure 72. Research Process and Data Source

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