

Global Heart Lung Machine Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Heart Lung Machine market size is expected to reach \$ 408 million by 2032, rising at a market growth of 3.2% CAGR during the forecast period (2026-2032).

Heart Lung Machines are critical medical devices used in extracorporeal circulation during cardiac surgeries, temporarily replacing the functions of the heart and lungs to maintain continuous blood circulation and oxygenation. The device primarily consists of a blood pump, oxygenator, heat exchanger, and tubing system, which withdraws blood from the body, oxygenates and regulates its temperature, and returns it to the patient, providing stable support for cardiac or complex major vascular surgeries. The primary function of heart lung machines is to ensure adequate tissue oxygenation and circulatory stability during surgery, minimizing the risks associated with cardiac arrest and hypoperfusion, thereby enhancing surgical safety and postoperative recovery. With advances in cardiac surgery, minimally invasive procedures, and precision surgical management, heart lung machines have become indispensable auxiliary devices in modern cardiac operations, also playing important roles in clinical research, heart transplantation, and intensive care settings. In 2025, global Heart Lung Machines production reached approximately 1224 Units and price is about 260 K USD/Unit. The average gross profit margin of this product is 45%.

The development of the heart lung machine market is driven by the increasing global burden of cardiovascular diseases and the rising demand for high-risk surgeries. With population aging and a higher prevalence of chronic heart conditions, the number of cardiac surgeries is steadily increasing, creating continuous market demand for high-performance extracorporeal circulation devices. Meanwhile, the rapid advancement of minimally invasive cardiac surgery, complex major vascular procedures, and heart transplantation has placed higher requirements on device performance and safety.

Clinical studies indicate that high-precision heart lung machines can effectively improve intraoperative hemodynamic stability, reduce organ ischemia risk, and enhance postoperative recovery. These technological advantages drive hospitals to upgrade equipment and offer manufacturers opportunities for innovation and intelligent device upgrades.

Despite technological maturity, the market faces multiple challenges. Some hospitals lack awareness of the devices' value, resulting in regional differences in deployment. High equipment costs and disposable consumables, combined with limited hospital budgets, constrain market penetration. The complexity of device operation requires skilled medical staff and clinical experience, increasing barriers to use. Additionally, factors such as blood compatibility, air embolism risks, and potential equipment malfunctions during surgery may affect patient safety, representing inherent market risks. These challenges necessitate continuous improvements in technical reliability, user experience, and after-sales service by manufacturers.

With the expansion and technological upgrade of cardiac surgery, demand for heart lung machines is trending toward higher intelligence, precision, and safety. Device utilization continues to grow in complex cardiac surgeries, heart transplantation, and high-risk patient procedures. The development of minimally invasive surgery and enhanced recovery procedures also drives higher expectations for device performance, controllability, and modular design. In the future, as digital operating rooms and intelligent monitoring systems become widespread, heart lung machines are expected to achieve deeper integration with surgical workstations, patient monitoring systems, and clinical information platforms, supporting intraoperative decision-making and remote monitoring for more precise perioperative management.

The upstream raw materials for heart lung machines primarily include high-precision blood pumps, motor and drive modules, oxygenator materials, heat exchangers, and medical tubing systems. Blood pumps and motor modules are core hardware, directly affecting the stability and accuracy of blood circulation. Oxygenator and heat exchanger materials require high standards for blood compatibility, oxygenation efficiency, and temperature control precision, while medical tubing and disposable consumables are critical for safety and biocompatibility. With advances in medical materials science and microelectronic control technologies, upstream material innovation will continue to enhance performance, safety, and intelligence of heart lung machines, providing technical support for product differentiation and market expansion.

This report studies the global Heart Lung Machine production, demand, key

manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Heart Lung Machine 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 Heart Lung Machine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Heart Lung Machine total production and demand, 2021-2032, (Units)

Global Heart Lung Machine total production value, 2021-2032, (USD Million)

Global Heart Lung Machine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Heart Lung Machine consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Heart Lung Machine domestic production, consumption, key domestic manufacturers and share

Global Heart Lung Machine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Heart Lung Machine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Heart Lung Machine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Heart Lung Machine 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 LivaNova (Sorin), Getinge (Maquet), Medtronic, Terumo CV Group, Braile Biomedica, Shenzhen Hannuo, Fresenius, Changzheng Medical, 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 Heart Lung Machine market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K USD/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 Heart Lung Machine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Heart Lung Machine Market, Segmentation by Type:

Single Roller Pump Heart Lung Machine

Double Roller Pump Heart Lung Machine

Global Heart Lung Machine Market, Segmentation by Surgery Type:

Open Surgery

Minimally Invasive

Emergency Surgery

Global Heart Lung Machine Market, Segmentation by End Users:

General Hospitals

Surgical Centers

Other

Global Heart Lung Machine Market, Segmentation by Application:

Cardiac Surgery

Lung Transplant Operation

Acute Respiratory Failure Treatment

Other

Companies Profiled:

LivaNova (Sorin)

Getinge (Maquet)

Medtronic

Terumo CV Group

Braile Biomedica

Shenzhen Hannuo

Fresenius

Changzheng Medical

Key Questions Answered:

1. How big is the global Heart Lung Machine market?
2. What is the demand of the global Heart Lung Machine market?
3. What is the year over year growth of the global Heart Lung Machine market?
4. What is the production and production value of the global Heart Lung Machine market?
5. Who are the key producers in the global Heart Lung Machine market?
6. What are the growth factors driving the market demand?

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