

# Latin America Heart Lung Machine Market Size, Share & Trends Analysis Report By Product, By Application (Coronary Artery Bypass Grafting, Heart Valve Surgeries, Heart Transplant, Lung Transplant), By End Use, By Country, And Segment Forecasts, 2026 - 2033

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## Abstracts

The Latin America heart lung machine market size was estimated at USD 180.3 million in 2025 and is projected to reach USD 256.8 million by 2033, growing at a CAGR of 4.5% from 2026 to 2033. The market growth is driven by the rising prevalence of cardiovascular diseases, number of cardiac surgeries, adoption of advanced cardiopulmonary bypass technologies, and expanding healthcare infrastructure in public and private hospitals across Latin America.

In February 2025, Lancet Regional Health Americas reported that in 2021, Latin America and the Caribbean accounted for a growing share of the region's cardiovascular disease burden, with CVD causing 1.1 million deaths in the Americas and ischemic heart disease and stroke as the leading causes.

The expansion of heart and lung transplantation programs in Latin America is significantly increasing demand for advanced perfusion and extracorporeal support technologies, such as heart-lung (HL) machines and related consumables. According to a recent registry, 12,374 heart transplants were conducted at 166 centers across 16 Latin American countries between 1968 and December 2022. This procedural volume reflects a maturing transplant infrastructure in the region, which in turn is driving further need for perfusion equipment and services.

Moreover, lung transplantation is on the rise in Latin America. For instance, Brazil's national registry reported 78 lung transplants performed in 2023 across three states

(Rio Grande do Sul, Rio de Janeiro, and S?o Paulo), equating to 0.4 transplants per million populations. This figure illustrates growing capacity and a positive trend in advanced organ transplantation-a promising sign for the heart-lung machine market, particularly for devices offering dual heart-lung support or advanced perfusion capabilities. Similarly, the Christus Muguerza hospital in Monterrey is the only active lung transplant program in Mexico, performing 35 transplants between August 2017 and March 2023.

The requirements of heart and lung transplant programs drive demand for high-specification equipment and consumables, as these procedures often involve extended perfusion times, combined organ transplants (such as heart lung), and advanced monitoring needs. Furthermore, the Latin America heart transplant registry reports combined organ transplants occurring in 62.5% of participating countries. These more complex cases result in higher equipment usage and increased consumption of disposables (such as oxygenators, perfusion circuits, and cannulae).

#### Latin America Heart Lung Machine Market Report Segmentation

This report forecasts revenue & volume growth at the regional and country level and provides an analysis of industry trends in each sub-segment from 2021 to 2033. For this study, Grand View Research has segmented the Latin America cardiac leads market report based on product, application, end use, and country:

Product Outlook (Unit Volume, '000 Units; Revenue, USD Million, 2021 - 2033)

##### Capital Equipment

Pumps

Heater-Cooler Units / Heat Exchange Systems

Monitoring Systems

Others

##### Consumables

Oxygenators

By Product

Membrane Oxygenators

ECMO Oxygenators

Pediatric/Neonatal Oxygenators

Other Oxygenators

By Age Group

Adult

Pediatric

Cannula

By Product

Arterial Cannulas

Venous Cannulas

Cardioplegia Cannulas

Vent Cannulas

ECMO Cannulas

By Age Group

Adult

Pediatric

Blood Reservoirs & Filtration Systems

Tubing Sets & Circuits

## Accessories & Consumables

Application Outlook (Revenue, USD Million, 2021 - 2033)

Coronary Artery Bypass Grafting (CABG)

Heart Valve Surgeries

Heart Transplant

Lung Transplant

Others

End Use Outlook (Revenue, USD Million, 2021 - 2033)

Public Healthcare Institutions

Private Healthcare Institutions

Country Outlook (Unit Volume, '000 Units; Average Selling Price [USD per Unit]; Revenue, USD Million, 2021 - 2033)

Brazil

Mexico

Argentina

Colombia

Chile

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