

Extracorporeal Membrane Oxygenation Machine Market by Product, Component, Patient Type (Neonates, Pediatrics and Adults), Modality Outlook (Veno-Venous, Veno-Arterio and Arterio-Venous), Applications, and Region - Global Forecast to 2026

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Abstracts

The global ECMO machine market is expected to reach USD 673 million by 2026 from an estimated USD 531 million in 2021, at a CAGR of 4.9% from 2021 to 2026. An ECMO machine acts as an artificial heart and lung for a patient whose own heart or lungs cannot provide enough blood flow or get enough oxygen into the blood. ECMO is used after other methods of supporting the heart and lungs do not work. The goal of the ECMO is to let the heart and lungs recover while the patient is supported by the ECMO machine. The major factors driving the growth of this market include the increasing geriatric population and growth in disease incidence as well as favorable government regulations, investments, and initiatives. The advantages of ECMO machines have played a key part in their adoption; their speed and accuracy, as well as quick processing times. This has pushed companies to focus on product development and innovation. However, these systems are priced at a premium, which slows their greater adoption. Other factors such as declining reimbursements, lack of infrastructure, particularly in developing and underdeveloped countries, and potential risks associated with radiation exposure are also expected to hinder the growth of this market.

“Respiratory segment accounted for the largest share of global ECMO machine market in 2020”

On the basis of applications, the ECMO machine market is segmented into respiratory, cardiac and ECPR applications. The respiratory segment is expected to dominate this market during the forecast period. Growth in this market can be attributed to the

increasing prevalence of target diseases, high demand for early diagnosis and diagnostic imaging, and technological advancements in the ECMO machine market. Moreover, the rising prevalence of lung diseases like tuberculosis, thoracic malignancies, osteoporosis, fractures, and CVDs increases the demand for medical imaging for diagnosis.

“Arterio-Venous segment accounted for the largest market share of the ECMO machine market in 2020”

On the basis of modality, the ECMO machine market is segmented into veno-arterio, veno-venous and arterio-venous. The arterio-venous segment accounted for the larger market share. The advantages associated with this segment, such as effective dynamic range, better medical evaluation, are contributing to the growth of this technology segment.

“Increasing number of disorders/diseases in growing population resulting in an increase in the purchase of ECMO machines ”

On the basis of patient type, the ECMO machine market is segmented into neonates, pediatric and adults. The adult segment contributed to the largest share of global ECMO machine market in 2020. ECMO has been used for more than 40 years, and its benefits with neonates with respiratory distress are well recognized. The benefits of ECMO in adult patients with cardiac or respiratory failure are still debated, as ECMO was initially associated with low survival rates. However, recent technological advancements in ECMO circuits have led to a reduction in the rate of technical issues and complications.

“Controllers, by component, have contributed the largest share in the ECMO machine market”

Based on component, the global ECMO machine market is segmented into pumps, oxygenators, controllers, cannula and accessories. The controllers segment is expected to dominate the market during the forecast period. The large share of this segment can be attributed to the greater adoption of the systems among end users due to their lowercost compared to others.

“Portable Segment, by product type, has commanded the highest growth rate in the forecast period”

Based on product type, the ECMO machine market is segmented into Static ECMO

machines and Portable ECMO machines. Portable ECMO machine segment is expected to dominate the market during the forecast period. Portable ECMO machines can be transported to any desired location and they are light in weight. These systems are especially used in a variety of imaging-set ups, including intensive care units, cardiac care units, neonatal intensive care units, operating rooms, emergency rooms, and at the patient's bedside for critically ill patients or patients with mobility challenges.

“The APAC market, by region, to register highest growth rate in the forecast period”

The ECMO Machine market is segmented into five major regions—North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. The Asia-Pacific market is expected to register the highest growth in the forecast period. Growth in the ECMO machine market in the Asia Pacific is mainly driven by the growing geriatric population, particularly in Japan; increasing disposable incomes, allowing for greater affordability for advanced technologies; the rising prevalence of target diseases; and favorable government initiatives. Such factors help to drive the market for digital imaging systems in this region and draw foreign investments and partnerships. On the other hand, low hospital budgets, high equipment costs, and a lack of government investments in some countries are limiting the growth of the market in the Asia Pacific to a certain extent.

A breakdown of the primary participants referred to for this report is provided below:

By Company Type: Tier 1–25%, Tier 2–37%, and Tier 3– 38%

By Designation: C-level–34%, Director-level–35%, and Others–31%

By Region: North America–24%, Europe–32%, Asia Pacific–28%, Latin America–10%, and the Middle East & Africa–6%

The ECMO machine market is dominated by Fresenius Medical care AG & Co. KGaA(Germany), Getinge Group (Sweden), Microport (China). Other leading market players include Medtronic plc (US), Terumo cardiovascular Systems Corporation (Japan), Nipro Corporation (Japan), and Livanova plc (UK).

Research Coverage

This report studies the ECMO machine market based on patient type, application,

product, component, modality outlook and region. It also covers the factors affecting market growth, analyzes the various opportunities and challenges in the market, and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micromarkets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to five main regions (and the respective countries in these regions).

Reasons to Buy the Report

The report will enable established firms as well as entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them to garner a larger market share. Firms purchasing the report could use one or a combination of the below-mentioned strategies for strengthening their market presence.

This report provides insights on the following pointers:

Market Penetration: Comprehensive information on the product portfolios offered by the top players in the ECMO machine market

Product Development/Innovation: Detailed insights on the upcoming trends, R&D activities, and product launches in the ECMO machine market

Market Development: Comprehensive information on lucrative emerging regions

Market Diversification: Exhaustive information about new products, growing geographies, and recent developments in the ECMO machine market

Competitive Assessment: In-depth assessment of market segments, growth strategies, revenue analysis, and products of the leading market players.

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(Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats))*

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*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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