

# **Perfusion System Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application**

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## **Abstracts**

### Perfusion Systems Market Summary

#### Introduction

Perfusion systems, critical for cardiopulmonary bypass, cell perfusion, and ex vivo organ preservation, support complex surgeries and organ transplants. Driven by the global burden of cardiovascular diseases (CVD), causing 17.9 million deaths annually, and over 150,000 organ transplants yearly, these systems are essential in heart surgeries and extending organ viability. Technological advancements like normothermic perfusion, AI-driven monitoring, and portable designs enhance outcomes. The aging population, projected to reach 2.1 billion by 2050, further fuels demand. The global market is projected to reach between USD 700 million and USD 1,000 million in 2025, with a CAGR of 3.6% to 5.8% through 2030.

#### Regional Analysis

**North America:** The U.S. leads with advanced transplant centers, while Canada focuses on cardiac surgeries.

**Europe:** Germany, France, and the UK drive demand due to high CVD prevalence and transplant programs.

**Asia Pacific:** China sees growth from rising heart surgeries, while Japan emphasizes precision perfusion.

Rest of the World: Brazil expands transplant infrastructure, and India boosts cardiac care.

### Application Analysis

Cardiopulmonary Perfusion Systems: Expected growth of 3.7%-5.9%, driven by coronary artery bypass grafting. Trends focus on AI integration for real-time monitoring.

Cell Perfusion Systems: Projected growth of 3.6%-5.8%, linked to research applications. Developments emphasize automation for consistency.

Ex Vivo Organ Perfusion: Anticipated growth of 3.8%-6.0%, key for transplants. Advances prioritize normothermic systems to extend organ viability.

### Key Market Players

Leading firms include Medtronic, offering AI-enhanced systems; Getinge, advancing autologous blood recovery; LivaNova, launching Essenz; Nipro Corporation, scaling perfusion tech; Terumo Corporation, boosting cardiac solutions; Fresenius, focusing on dialysis integration; Spectrum Medical, targeting efficiency; Repligen Corporation, supporting cell perfusion; Harvard Bioscience, enhancing research tools; and XVIVO Perfusion, specializing in organ preservation.

### Porter's Five Forces Analysis

? Threat of New Entrants: Low, due to high R&D costs, regulatory barriers, and specialized expertise required.

? Threat of Substitutes: Low, as perfusion systems are indispensable for specific surgeries and transplants.

? Bargaining Power of Buyers: Moderate, with hospitals seeking cost-effective, reliable systems, though clinical needs limit options.

? Bargaining Power of Suppliers: Moderate, with key component providers holding influence.

? Competitive Rivalry: High, with competition on innovation, reliability, and integration with surgical workflows.

## Market Opportunities and Challenges

### Opportunities:

? Rising CVD (17.9 million deaths) and transplant demand (150,000 procedures) drive growth.

? Aging populations and normothermic perfusion boost adoption, while AI and portable designs enhance outcomes.

? Asia's healthcare expansion increases usage.

### Challenges:

? High system costs limit adoption in low-income regions.

? Stringent regulatory approvals slow innovation.

? Skilled operator shortages in developing markets restrict expansion.

## Market News

? In August 2023, TransMedics Group acquired assets related to the Ex-Vivo Organ Support System from Bridge to Life Ltd.

? In February 2023, LivaNova initiated the commercial release of its Essenz perfusion system in select European centers.

## Contents

### **CHAPTER 1 EXECUTIVE SUMMARY**

### **CHAPTER 2 ABBREVIATION AND ACRONYMS**

### **CHAPTER 3 PREFACE**

- 3.1 Research Scope
- 3.2 Research Sources
  - 3.2.1 Data Sources
  - 3.2.2 Assumptions
- 3.3 Research Method
- Chapter Four Market Landscape
- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

### **CHAPTER 5 MARKET TREND ANALYSIS**

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

### **CHAPTER 6 INDUSTRY CHAIN ANALYSIS**

- 6.1 Upstream/Suppliers Analysis
- 6.2 Perfusion System Analysis
  - 6.2.1 Technology Analysis
  - 6.2.2 Cost Analysis
  - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

### **CHAPTER 7 LATEST MARKET DYNAMICS**

- 7.1 Latest News
- 7.2 Merger and Acquisition

7.3 Planned/Future Project

7.4 Policy Dynamics

## **CHAPTER 8 HISTORICAL AND FORECAST PERFUSION SYSTEM MARKET IN NORTH AMERICA (2020-2030)**

8.1 Perfusion System Market Size

8.2 Perfusion System Market by End Use

8.3 Competition by Players/Suppliers

8.4 Perfusion System Market Size by Type

8.5 Key Countries Analysis

8.5.1 United States

8.5.2 Canada

8.5.3 Mexico

## **CHAPTER 9 HISTORICAL AND FORECAST PERFUSION SYSTEM MARKET IN SOUTH AMERICA (2020-2030)**

9.1 Perfusion System Market Size

9.2 Perfusion System Market by End Use

9.3 Competition by Players/Suppliers

9.4 Perfusion System Market Size by Type

9.5 Key Countries Analysis

9.5.1 Brazil

9.5.2 Argentina

9.5.3 Chile

9.5.4 Peru

## **CHAPTER 10 HISTORICAL AND FORECAST PERFUSION SYSTEM MARKET IN ASIA & PACIFIC (2020-2030)**

10.1 Perfusion System Market Size

10.2 Perfusion System Market by End Use

10.3 Competition by Players/Suppliers

10.4 Perfusion System Market Size by Type

10.5 Key Countries Analysis

10.5.1 China

10.5.2 India

10.5.3 Japan

- 10.5.4 South Korea
- 10.5.5 Southeast Asia
- 10.5.6 Australia

## **CHAPTER 11 HISTORICAL AND FORECAST PERFUSION SYSTEM MARKET IN EUROPE (2020-2030)**

- 11.1 Perfusion System Market Size
- 11.2 Perfusion System Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Perfusion System Market Size by Type
- 11.5 Key Countries Analysis
  - 11.5.1 Germany
  - 11.5.2 France
  - 11.5.3 United Kingdom
  - 11.5.4 Italy
  - 11.5.5 Spain
  - 11.5.6 Belgium
  - 11.5.7 Netherlands
  - 11.5.8 Austria
  - 11.5.9 Poland
  - 11.5.10 Russia

## **CHAPTER 12 HISTORICAL AND FORECAST PERFUSION SYSTEM MARKET IN MEA (2020-2030)**

- 12.1 Perfusion System Market Size
- 12.2 Perfusion System Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Perfusion System Market Size by Type
- 12.5 Key Countries Analysis
  - 12.5.1 Egypt
  - 12.5.2 Israel
  - 12.5.3 South Africa
  - 12.5.4 Gulf Cooperation Council Countries
  - 12.5.5 Turkey

## **CHAPTER 13 SUMMARY FOR GLOBAL PERFUSION SYSTEM MARKET (2020-2025)**

- 13.1 Perfusion System Market Size
- 13.2 Perfusion System Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Perfusion System Market Size by Type

## **CHAPTER 14 GLOBAL PERFUSION SYSTEM MARKET FORECAST (2025-2030)**

- 14.1 Perfusion System Market Size Forecast
- 14.2 Perfusion System Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Perfusion System Type Forecast

## **CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS**

- 15.1 Medtronic
  - 15.1.1 Company Profile
  - 15.1.2 Main Business and Perfusion System Information
  - 15.1.3 SWOT Analysis of Medtronic
  - 15.1.4 Medtronic Perfusion System Revenue, Gross Margin and Market Share (2020-2025)
- 15.2 Getinge
  - 15.2.1 Company Profile
  - 15.2.2 Main Business and Perfusion System Information
  - 15.2.3 SWOT Analysis of Getinge
  - 15.2.4 Getinge Perfusion System Revenue, Gross Margin and Market Share (2020-2025)
- 15.3 LivaNova
  - 15.3.1 Company Profile
  - 15.3.2 Main Business and Perfusion System Information
  - 15.3.3 SWOT Analysis of LivaNova
  - 15.3.4 LivaNova Perfusion System Revenue, Gross Margin and Market Share (2020-2025)
- 15.4 Nipro Corporation
  - 15.4.1 Company Profile
  - 15.4.2 Main Business and Perfusion System Information
  - 15.4.3 SWOT Analysis of Nipro Corporation
  - 15.4.4 Nipro Corporation Perfusion System Revenue, Gross Margin and Market Share (2020-2025)

## 15.5 Terumo Corporation

### 15.5.1 Company Profile

### 15.5.2 Main Business and Perfusion System Information

### 15.5.3 SWOT Analysis of Terumo Corporation

### 15.5.4 Terumo Corporation Perfusion System Revenue, Gross Margin and Market Share (2020-2025)

## 15.6 Fresenius

### 15.6.1 Company Profile

### 15.6.2 Main Business and Perfusion System Information

### 15.6.3 SWOT Analysis of Fresenius

### 15.6.4 Fresenius Perfusion System Revenue, Gross Margin and Market Share (2020-2025)

## 15.7 Spectrum Medical

### 15.7.1 Company Profile

### 15.7.2 Main Business and Perfusion System Information

### 15.7.3 SWOT Analysis of Spectrum Medical

### 15.7.4 Spectrum Medical Perfusion System Revenue, Gross Margin and Market Share (2020-2025)

## 15.8 Repligen Corporation

### 15.8.1 Company Profile

### 15.8.2 Main Business and Perfusion System Information

### 15.8.3 SWOT Analysis of Repligen Corporation

### 15.8.4 Repligen Corporation Perfusion System Revenue, Gross Margin and Market Share (2020-2025)

Please ask for sample pages for full companies list

Tables and Figures

Table Abbreviation and Acronyms

Table Research Scope of Perfusion System Report

Table Data Sources of Perfusion System Report

Table Major Assumptions of Perfusion System Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Perfusion System Picture

Table Perfusion System Classification

Table Perfusion System Applications

Table Drivers of Perfusion System Market

Table Restraints of Perfusion System Market

Table Opportunities of Perfusion System Market

Table Threats of Perfusion System Market



Table Covid-19 Impact For Perfusion System Market
Table Raw Materials Suppliers
Table Different Production Methods of Perfusion System
Table Cost Structure Analysis of Perfusion System
Table Key End Users
Table Latest News of Perfusion System Market
Table Merger and Acquisition
Table Planned/Future Project of Perfusion System Market
Table Policy of Perfusion System Market
Table 2020-2030 North America Perfusion System Market Size
Figure 2020-2030 North America Perfusion System Market Size and CAGR
Table 2020-2030 North America Perfusion System Market Size by Application
Table 2020-2025 North America Perfusion System Key Players Revenue
Table 2020-2025 North America Perfusion System Key Players Market Share
Table 2020-2030 North America Perfusion System Market Size by Type
Table 2020-2030 United States Perfusion System Market Size
Table 2020-2030 Canada Perfusion System Market Size
Table 2020-2030 Mexico Perfusion System Market Size
Table 2020-2030 South America Perfusion System Market Size
Figure 2020-2030 South America Perfusion System Market Size and CAGR
Table 2020-2030 South America Perfusion System Market Size by Application
Table 2020-2025 South America Perfusion System Key Players Revenue
Table 2020-2025 South America Perfusion System Key Players Market Share
Table 2020-2030 South America Perfusion System Market Size by Type
Table 2020-2030 Brazil Perfusion System Market Size
Table 2020-2030 Argentina Perfusion System Market Size
Table 2020-2030 Chile Perfusion System Market Size
Table 2020-2030 Peru Perfusion System Market Size
Table 2020-2030 Asia & Pacific Perfusion System Market Size
Figure 2020-2030 Asia & Pacific Perfusion System Market Size and CAGR
Table 2020-2030 Asia & Pacific Perfusion System Market Size by Application
Table 2020-2025 Asia & Pacific Perfusion System Key Players Revenue
Table 2020-2025 Asia & Pacific Perfusion System Key Players Market Share
Table 2020-2030 Asia & Pacific Perfusion System Market Size by Type
Table 2020-2030 China Perfusion System Market Size
Table 2020-2030 India Perfusion System Market Size
Table 2020-2030 Japan Perfusion System Market Size
Table 2020-2030 South Korea Perfusion System Market Size
Table 2020-2030 Southeast Asia Perfusion System Market Size

Table 2020-2030 Australia Perfusion System Market Size
Table 2020-2030 Europe Perfusion System Market Size
Figure 2020-2030 Europe Perfusion System Market Size and CAGR
Table 2020-2030 Europe Perfusion System Market Size by Application
Table 2020-2025 Europe Perfusion System Key Players Revenue
Table 2020-2025 Europe Perfusion System Key Players Market Share
Table 2020-2030 Europe Perfusion System Market Size by Type
Table 2020-2030 Germany Perfusion System Market Size
Table 2020-2030 France Perfusion System Market Size
Table 2020-2030 United Kingdom Perfusion System Market Size
Table 2020-2030 Italy Perfusion System Market Size
Table 2020-2030 Spain Perfusion System Market Size
Table 2020-2030 Belgium Perfusion System Market Size
Table 2020-2030 Netherlands Perfusion System Market Size
Table 2020-2030 Austria Perfusion System Market Size
Table 2020-2030 Poland Perfusion System Market Size
Table 2020-2030 Russia Perfusion System Market Size
Table 2020-2030 MEA Perfusion System Market Size
Figure 2020-2030 MEA Perfusion System Market Size and CAGR
Table 2020-2030 MEA Perfusion System Market Size by Application
Table 2020-2025 MEA Perfusion System Key Players Revenue
Table 2020-2025 MEA Perfusion System Key Players Market Share
Table 2020-2030 MEA Perfusion System Market Size by Type
Table 2020-2030 Egypt Perfusion System Market Size
Table 2020-2030 Israel Perfusion System Market Size
Table 2020-2030 South Africa Perfusion System Market Size
Table 2020-2030 Gulf Cooperation Council Countries Perfusion System Market Size
Table 2020-2030 Turkey Perfusion System Market Size
Table 2020-2025 Global Perfusion System Market Size by Region
Table 2020-2025 Global Perfusion System Market Size Share by Region
Table 2020-2025 Global Perfusion System Market Size by Application
Table 2020-2025 Global Perfusion System Market Share by Application
Table 2020-2025 Global Perfusion System Key Vendors Revenue
Figure 2020-2025 Global Perfusion System Market Size and Growth Rate
Table 2020-2025 Global Perfusion System Key Vendors Market Share
Table 2020-2025 Global Perfusion System Market Size by Type
Table 2020-2025 Global Perfusion System Market Share by Type
Table 2025-2030 Global Perfusion System Market Size by Region
Table 2025-2030 Global Perfusion System Market Size Share by Region

Table 2025-2030 Global Perfusion System Market Size by Application

Table 2025-2030 Global Perfusion System Market Share by Application

Table 2025-2030 Global Perfusion System Key Vendors Revenue

Figure 2025-2030 Global Perfusion System Market Size and Growth Rate

Table 2025-2030 Global Perfusion System Key Vendors Market Share

Table 2025-2030 Global Perfusion System Market Size by Type

Table 2025-2030 Perfusion System Global Market Share by Type

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