

Extracorporeal Membrane Oxygenation Machine Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Component Type (Pumps, Oxygenator, Controllers, Cannula, Accessories), By Modality (Veno-Arterial, Veno-Venous, Arterio-Venous), By Patient Type (Neonates, Pediatric, Adult), By Application (Respiratory, Cardiac, ECPR), By Region and Competition, 2019-2029F

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Abstracts

Global Extracorporeal Membrane Oxygenation Machine Market was valued at USD 394.21 Million in 2023 and is anticipated to project a steady growth in the forecast period with a CAGR of 4.88% through 2029. The Extracorporeal Membrane Oxygenation (ECMO) machine market encompasses the manufacturing and sales of advanced medical equipment used to provide prolonged cardiac and respiratory support to patients whose heart and lungs are unable to provide an adequate amount of gas exchange to sustain life. This market responds to the needs of critical care in hospital settings, particularly for patients with life-threatening respiratory and cardiac conditions. The demand within this market is influenced by technological advancements, the prevalence of cardiopulmonary diseases, and improvements in healthcare infrastructure.

Key Market Drivers

Technological Advancement Propels the Market Growth

The advancement in technology is the significant factor which drives the growth of

Global Extracorporeal Membrane Oxygenation Machine market. Technological advancements have led to the development of more advanced ECMO machines with improved performance and capabilities. Draper did just that, advancing an artificial lung technique called extracorporeal membrane oxygenation (ECMO). In ECMO, blood is taken from the patient's vascular system and circulated by a mechanical pump through an extracorporeal oxygenator and heat exchanger. Oxygen saturated blood is returned to the body while Carbon dioxide (CO₂) is removed. With enhanced patients' outcome these machines are designed to provide better oxygenation and carbon dioxide removal. Advancements in pump design, oxygenators, sensors, and control systems have all contributed to the improved performance of ECMO machines, making them more efficient and reliable and drives the growth of Global ECMO machine market.

Increasing Incidence of Respiratory & Cardiac Disorder

The increasing incidence of respiratory and cardiac disorder plays a significant role in driving the growth of Global Extracorporeal Membrane Oxygenation Machine market. Estimates of the incidence of ARDS in the United States range from 64.2 to 78.9 cases/100,000 person-years. Twenty-five percent of ARDS cases are initially classified as mild and 75% are classified as moderate or severe. 105 of all intensive care patients and 23% of ventilator patients met ARDS criteria. This equates to an annual intensive care incidence of 5.5 per intensive care bed. Acute respiratory distress syndrome (ARDS), cardiogenic shock, and heart failure such respiratory and cardiac disorders, are becoming more common worldwide. Aging population, sedentary lifestyles, and unhealthy dietary habits such factors contribute to the increasing burden of these diseases. As the number of patients with these conditions grows, the demand for ECMO therapy also rises. ECMO machines are improved life-support devices that give short term respiratory and/or cardiac support to an individual with severe lung or heart dysfunction. With the help of these machines oxygenate the blood and remove carbon dioxide, allowing the lungs or heart to rest and recover. ECMO therapy can be a life-saving treatment option for patients who are unresponsive to conventional therapies. The growing awareness of the benefits and effectiveness of ECMO therapy has led to increased demand and drives the growth of Global Extracorporeal Membrane Oxygenation Machine market.

Patient Preference for Advanced Treatment Modalities

The global demand for Extracorporeal Membrane Oxygenation (ECMO) machines is experiencing a significant upsurge due to patient preference for advanced treatment

modalities. Patients and their families increasingly seek out advanced medical interventions that offer the potential for improved outcomes, particularly in cases of severe respiratory or cardiac failure where conventional therapies may not suffice. ECMO therapy, which provides temporary support to failing heart and lung functions, has garnered attention as a life-saving treatment option in such critical situations. Patients, especially those with acute respiratory distress syndrome (ARDS) or severe pneumonia, are increasingly aware of the potential benefits of ECMO in providing vital oxygenation and circulation support while allowing time for their lungs to heal. Advancements in ECMO technology have led to improved safety profiles and reduced complications, further bolstering patient confidence in this treatment modality. As a result, there is a growing demand for ECMO machines globally, driven by the desire among patients and healthcare providers alike to access advanced medical interventions that offer the best chances of survival and recovery in critical care scenarios.

Healthcare Insurance Coverage for ECMO Procedures in Many Countries

The increasing availability of healthcare insurance coverage for Extracorporeal Membrane Oxygenation (ECMO) procedures in many countries is significantly boosting the demand for ECMO machines on a global scale. As healthcare systems recognize the life-saving potential of ECMO therapy, insurance providers are expanding coverage to include ECMO procedures, thereby reducing financial barriers for patients in need of this advanced treatment. With ECMO therapy often being a costly intervention, the availability of insurance coverage enables more patients to access this life-saving technology without facing prohibitive out-of-pocket expenses. The inclusion of ECMO in insurance coverage encourages healthcare facilities to invest in ECMO machines and infrastructure, ensuring that these vital resources are readily available to patients in need. The expansion of insurance coverage for ECMO procedures not only improves patient access to critical care but also drives the adoption of ECMO technology by healthcare providers worldwide. Consequently, the demand for ECMO machines continues to rise globally as healthcare systems strive to meet the growing need for advanced life support interventions and ensure equitable access to life-saving treatments for all patients, regardless of their financial circumstances.

Key Market Challenges

High Costs

The high costs associated with acquiring and maintaining Extracorporeal Membrane

Oxygenation (ECMO) machines pose a significant barrier to their widespread adoption and are contributing to a decrease in demand globally. ECMO machines are complex medical devices that require substantial investment in both initial procurement and ongoing maintenance, including regular servicing, replacement parts, and skilled personnel training. These high costs can strain healthcare budgets, particularly in resource-limited settings or regions with constrained healthcare funding. The cost-effectiveness of ECMO therapy compared to alternative treatments may be a consideration for healthcare providers when evaluating its feasibility for their facilities. The financial burden associated with ECMO machines may deter some healthcare facilities from investing in this life-saving technology, leading to reduced demand globally. The high costs of ECMO machines may limit access to ECMO therapy for patients in need, exacerbating disparities in healthcare access and outcomes. Therefore, efforts to mitigate the costs of ECMO machines through strategic procurement practices, collaborative purchasing agreements, and innovative financing models are essential to address the affordability challenges and increase the demand for ECMO machines globally.

Limited Patient Suitability

Limited patient suitability is a significant factor contributing to the decrease in demand for Extracorporeal Membrane Oxygenation (ECMO) machines globally. ECMO therapy is a highly specialized intervention typically reserved for patients with severe respiratory or cardiac failure who fail to respond to conventional treatments. However, not all patients are suitable candidates for ECMO therapy due to various factors, including advanced age, multiple comorbidities, and irreversible organ dysfunction. The stringent criteria for patient selection mean that only a subset of critically ill patients meets the eligibility criteria for ECMO support, thereby limiting the overall demand for ECMO machines. The complexity and invasiveness of ECMO therapy may pose risks and challenges for certain patient populations, further restricting its applicability. As a result, healthcare providers must carefully evaluate each patient's clinical status and prognosis to determine whether ECMO therapy is an appropriate treatment option. The limited patient suitability for ECMO therapy contributes to a decrease in demand for ECMO machines globally, as healthcare facilities prioritize other treatment modalities for patients who do not meet the criteria for ECMO support.

Key Market Trends

Increased Prevalence of Lifestyle Diseases

The increased prevalence of lifestyle diseases is contributing to a growing demand for Extracorporeal Membrane Oxygenation (ECMO) machines on a global scale. Lifestyle diseases, such as obesity, diabetes, and cardiovascular conditions, are becoming more prevalent due to factors such as sedentary lifestyles, poor dietary habits, and aging populations. These diseases can lead to severe respiratory or cardiac failure, necessitating advanced life support interventions like ECMO therapy. With lifestyle diseases on the rise, there is a corresponding increase in the number of patients at risk of developing critical conditions that may require ECMO support. Lifestyle-related factors can exacerbate existing health conditions, further driving the need for ECMO therapy in managing acute respiratory distress syndrome (ARDS), severe pneumonia, or other respiratory failures. As healthcare systems grapple with the growing burden of lifestyle diseases, the demand for ECMO machines is expected to continue rising to meet the needs of patients with severe respiratory or cardiac failure. Consequently, healthcare providers worldwide are investing in ECMO technology to ensure they have the necessary resources to manage the increasing caseload of patients with lifestyle-related critical illnesses.

Availability of Skilled Professionals to Operate ECMO Machines

The availability of skilled professionals to operate Extracorporeal Membrane Oxygenation (ECMO) machines is a critical factor driving the increasing demand for ECMO machines globally. ECMO therapy requires specialized expertise and training to ensure safe and effective implementation, monitoring, and management. As the complexity and sophistication of ECMO technology continue to evolve, there is a growing need for healthcare professionals with the necessary skills and experience to operate ECMO machines proficiently. However, the supply of such skilled professionals often lags behind the rising demand for ECMO therapy. Healthcare facilities must invest in training programs and workforce development initiatives to equip healthcare professionals, including perfusionists, critical care nurses, and respiratory therapists, with the specialized knowledge and skills required to operate ECMO machines competently. The global shortage of skilled ECMO specialists creates a competitive landscape for healthcare facilities seeking to recruit and retain qualified personnel, further driving the demand for ECMO machines as hospitals strive to expand their ECMO programs. Consequently, the availability of skilled professionals to operate ECMO machines is a crucial factor influencing the demand for ECMO machines worldwide, shaping the capacity of healthcare systems to provide life-saving ECMO therapy to patients in need.

Segmental Insights

Component Type Insights

Based on Component Type, Pumps have emerged as the fastest growing segment in the Global Extracorporeal Membrane Oxygenation Machine Market in 2023. These pumps, including centrifugal pumps and roller pumps, play an integral part in ensuring the continuous flow of blood that is vital for the survival of patients. Their significance lies in facilitating efficient oxygenation and removal of carbon dioxide from the patient's blood, thereby contributing to the overall effectiveness of the ECMO machine. By providing a steady and reliable blood flow, these pumps significantly enhance the operational efficiency and success rates of ECMO therapy, ultimately leading to improved patient outcomes and the potential to save countless lives. The reliability and performance of these pumps are key factors that healthcare professionals rely on for optimal patient care, making them indispensable components of the ECMO system.

Modality Insights

Based on Modality, Venous-Arterial have emerged as the dominating segment in the Global Extracorporeal Membrane Oxygenation Machine Market in 2023. This is primarily due to the comprehensive support capabilities offered by Venous-Arterial (VA) ECMO, specifically for patients requiring simultaneous cardiac and respiratory assistance. By providing immediate hemodynamic support in critical care scenarios such as cardiogenic shock or cardiac arrest, VA ECMO plays a pivotal role in saving lives. Its remarkable ability to swiftly stabilize patients and maintain vital organ function further underscores its dominance in the market. VA ECMO boasts advanced technology that enables precise monitoring and adjustment of blood flow, oxygenation, and ventilation parameters. This level of control ensures optimized patient management, especially for those with compromised cardiac and respiratory function.

VA ECMO's versatility allows for seamless integration with other critical care interventions and therapies, facilitating a multidisciplinary approach to patient care. This collaborative approach enhances treatment outcomes and improves patient survival rates. With its advanced technology and life-saving potential, VA ECMO continues to revolutionize critical care and shape the future of medical interventions. It sets new standards for patient care, outcomes, and advancements in the field of extracorporeal support systems. The Venous-Arterial (VA) modality of ECMO stands out as a frontrunner in the Global Extracorporeal Membrane Oxygenation Machine Market,

due to its comprehensive support capabilities, swift stabilization of critical patients, and advanced technology that optimizes patient management. The remarkable contributions of VA ECMO in critical care underscore its significance in saving lives and shaping the future of medical interventions.

Regional Insights

Based on Region, North America have emerged as the dominating region in the Global Extracorporeal Membrane Oxygenation Machine Market in 2023. This can be attributed to a multitude of factors, including its advanced healthcare infrastructure, substantial healthcare expenditure, and the presence of key market players. The rising prevalence of cardiopulmonary diseases and the establishment of an increasing number of Extracorporeal Membrane Oxygenation Machine (ECMO) centers further contribute to North America's significant market share. North America's leadership in the ECMO market is also fueled by its cutting-edge medical facilities and continuous advancements in the field. With state-of-the-art technology and highly skilled healthcare professionals, North America is able to provide exceptional ECMO services and solutions to patients in need. This level of expertise and innovation sets North America apart from other regions, solidifying its position as a global leader in the ECMO industry.

North America's commitment to research and development in the field of extracorporeal membrane oxygenation is noteworthy. The region actively supports studies and clinical trials aimed at improving the efficacy and safety of ECMO therapy. This dedication to advancing the field ensures that North America remains at the forefront of ECMO innovation, constantly pushing the boundaries of what is possible in patient care. North America's dominance in the Global Extracorporeal Membrane Oxygenation Machine Market can be attributed to its advanced healthcare infrastructure, substantial healthcare expenditure, and the presence of key market players. Its rising prevalence of cardiopulmonary diseases, increasing number of ECMO centers, cutting-edge medical facilities, and continuous advancements in the field contribute to its significant market share. North America's commitment to research and development further solidifies its position as a global leader in providing exceptional ECMO services and solutions.

Key Market Players

India Medtronic Private Limited

Terumo Cardiovascular Systems Corporation

MAQUET Holding B.V. & Co. KG

Medos Medizintechnik AG

Nipro Medical Corporation

MicroPort Scientific Corporation

XENIOS AG

LivaNova PLC

EUROSETS S.r.l.

Report Scope:

In this report, the Global Extracorporeal Membrane Oxygenation Machine Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Extracorporeal Membrane Oxygenation Machine Market, By Component Type:

Pumps

Oxygenator

Controllers

Cannula

Accessories

Extracorporeal Membrane Oxygenation Machine Market, By Modality:

%II%Veno-Arterial

%II%Veno-Venous

%II%Arterio-Venous

Extracorporeal Membrane Oxygenation Machine Market, By Patient Type:

%II%Neonates

%II%Pediatric

%II%Adults

Extracorporeal Membrane Oxygenation Machine Market, By Application:

%II%Respiratory

%II%Cardiac

%II%ECPR

Extracorporeal Membrane Oxygenation Machine Market, By Region:

%II%North America

%II%United States

%II%Canada

%II%Mexico

%II%Europe

%II%France

%II%United Kingdom

%II%Italy

%II%Germany

%II%Spain

%II%Asia Pacific

%II%China

%II%India

%II%Japan

%II%Australia

%II%South Korea

%II%South America

%II%Brazil

%II%Argentina

%II%Colombia

%II%Middle East & Africa

%II%South Africa

%II%Saudi Arabia

%II%UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global

Extracorporeal Membrane Oxygenation Machine Market - Global Industry Size, Share, Trends, Opportunity, and For...

Extracorporeal Membrane Oxygenation Machine Market.

Available Customizations:

Global Extracorporeal Membrane Oxygenation Machine Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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