

Asia Pacific Extracorporeal CO2 Removal Devices Market Size and Forecast (2021 - 2031)

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Abstracts

The Asia Pacific Extracorporeal CO2 Removal Devices Market is projected to grow significantly, reaching an estimated US\$ 42.1 million by 2031, up from US\$ 25.3 million in 2024, reflecting a compound annual growth rate (CAGR) of 7.7% from 2025 to 2031. This growth is driven by increasing healthcare awareness, rising incidences of respiratory diseases, and advancements in healthcare infrastructure across the region.

Market Overview

The market is segmented by country, with China, Japan, India, South Korea, Australia, and the Rest of Asia Pacific being the key players. China leads the market, holding the largest share and showing the highest growth potential. Japan and India are also significant contributors, benefiting from the rising prevalence of respiratory conditions and enhanced healthcare systems.

In terms of product segmentation, Extracorporeal CO2 Removal (ECCO2R) devices are the primary revenue generators, while disposables and consumables follow, albeit at a slower growth rate. Innovations in device technology, such as improved membranes and enhanced efficiency, are facilitating broader adoption in various healthcare settings.

Applications and End Users

ECCO2R technology is crucial in treating conditions like Acute Respiratory Distress Syndrome (ARDS) and Chronic Obstructive Pulmonary Disease (COPD). Hospitals are the primary end-users of these devices, while smaller clinics and centers are less common due to the technical complexities involved in ECCO2R.

The demand for ECCO2R devices is bolstered by several factors, including increased healthcare spending, urbanization leading to higher respiratory disease rates, and improved critical care infrastructure. However, challenges such as high costs, limited clinical evidence from extensive trials, and uneven distribution of trained personnel hinder widespread adoption. Currently, ECCO2R technology is primarily utilized in referral or academic medical centers rather than peripheral hospitals.

Strategic Insights

The aging population in the Asia Pacific region is a significant driver of the ECCO2R market. The World Health Organization (WHO) projects that the population aged 60 and over will rise from approximately 1.1 billion in 2023 to around 2.1 billion by 2050, constituting about 22% of the global population. This demographic shift correlates with an increase in chronic respiratory diseases, particularly among older adults who are more susceptible to acute respiratory failure.

Older patients often cannot tolerate the trauma of invasive mechanical ventilation, making ECCO2R a viable alternative or supplement. Studies indicate that ECCO2R can lead to fewer intubations and shorter durations of invasive mechanical ventilation, particularly beneficial for older patients with COPD.

Manufacturers are responding to these demographic and clinical needs through product innovations and clinical research. For instance, ALung Technologies' Hemolung RAS received FDA De Novo approval in 2024 as the first ECCO2R device for adults with reversible acute respiratory failure. This device operates at low blood flow rates, making it less stressful for elderly patients. Additionally, Baxter's PrismaLung+ is being tested for low-flow ECCO2R in ARDS patients.

Country Insights

China is emerging as the leading market for ECCO2R devices in the Asia Pacific region, driven by a rise in ARDS and COPD cases, worsened by air pollution and an aging population. Clinical studies in China have supported the use of ECCO2R in COVID-19-related ARDS cases, demonstrating its effectiveness in managing severe respiratory conditions.

Despite these advancements, challenges remain, including a lack of large-scale clinical trials and the concentration of ECCO2R use in high-tier hospitals. Factors such as device costs, facility requirements, and reimbursement policies are still uncertain, which

may limit broader adoption.

Conclusion

In summary, the Asia Pacific ECCO2R devices market is on a robust growth trajectory, with significant contributions from China, Japan, and India. The increasing prevalence of respiratory diseases among the aging population, coupled with innovations in device technology, positions ECCO2R as a critical solution in respiratory care. However, for widespread adoption, further clinical validation, favorable reimbursement frameworks, and enhanced healthcare capacity are essential.

Key Players

Key players in the market include Terumo Corp, Medtronic Plc, Baxter International Inc, LivaNova Plc, Getinge AB, Fresenius Medical Care AG & Co KGaA, Eurosets SRL, Aferetica s.r.l., Medica S.p.A., and ESTOR S.P.A. These companies are focusing on expansion, product innovation, and strategic mergers and acquisitions to enhance their market presence.

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