

South & Central America Extracorporeal CO2 Removal Devices Market Size and Forecast (2021 - 2031)

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Abstracts

The South & Central America Extracorporeal CO2 Removal Devices Market is projected to grow significantly, reaching an estimated US\$ 12.2 million by 2031, up from US\$ 7.7 million in 2024, reflecting a compound annual growth rate (CAGR) of 7.0% from 2025 to 2031.

Executive Summary and Market Analysis

The market for Extracorporeal CO2 Removal (ECCO2R) devices in South & Central America is primarily segmented into Brazil, Argentina, and the Rest of South & Central America. The adoption of ECCO2R technology is gaining traction, especially in countries with robust healthcare systems. Brazil is leading the region, driven by its large population and high prevalence of respiratory diseases, particularly Chronic Obstructive Pulmonary Disease (COPD). The integration of ECCO2R systems in Brazil's healthcare facilities has been pivotal for treating severe COPD exacerbations and facilitating lung transplants.

Despite the potential of ECCO2R technology, its utilization remains limited, indicating a gradual but promising trend towards broader adoption in healthcare. In contrast, the rest of Central America and other South American countries, such as Colombia, Chile, and Peru, are still in the nascent stages of exploring advanced respiratory therapies. Factors hindering the adoption of ECCO2R in these regions include constrained healthcare budgets, a shortage of specialists, and the high costs associated with advanced medical technologies. However, there is a growing interest in ECCO2R devices, particularly in urban health facilities equipped with aerosol therapy technologies.

In summary, while ECCO2R devices have established a foothold in Brazil and

Argentina, their future deployment across South & Central America appears promising. Key drivers for this growth include improvements in healthcare infrastructure, professional training, and ongoing research initiatives.

Strategic Insights

Market Segmentation Analysis

The South & Central America Extracorporeal CO2 Removal Devices Market is categorized by product, application, and end user:

By Product: The market is divided into Extracorporeal CO2 Devices and Consumables, with the Extracorporeal CO2 Devices segment leading in 2024.

By Application: The market is segmented into Chronic Obstructive Pulmonary Disease (COPD), Acute Respiratory Distress Syndrome (ARDS), and others, with COPD being the dominant application in 2024.

By End User: The market is categorized into Hospitals and Clinics, Ambulatory Surgical Centers, and others, with Hospitals and Clinics holding the largest share in 2024.

Market Outlook

A significant trend shaping the future of the ECCO2R devices market is the integration of Artificial Intelligence (AI) and Machine Learning (ML). This technological advancement is transforming ECCO2R devices from traditional high-end hardware into intelligent, self-optimizing therapeutic platforms. The integration of AI will enhance critical care by providing personalized therapy, automated adjustments, and real-time predictions of complications.

Current ECCO2R systems require substantial manual intervention, with healthcare personnel needing to make complex decisions regarding blood flow, sweep gas adjustments, and anticoagulation to mitigate risks. AI and ML can address these challenges by creating closed-loop control systems that adjust therapy based on real-time patient data, such as blood gas levels and hemodynamic status.

Leading manufacturers, including Medtronic and Getinge, are focusing on enhancing

their ECCO2R platforms with advanced data analytics capabilities. Future designs of ECCO2R systems are expected to incorporate micro-sensors that continuously feed data into ML algorithms, enabling predictive analytics for thrombosis and hemolysis, optimizing decarboxylation, and improving decision support systems for patient management.

Country Insights

Brazil is the largest market for ECCO2R technology in Latin America, primarily due to the high incidence of respiratory diseases like COPD and ARDS. The modernization of Brazil's healthcare system has facilitated the integration of ECCO2R devices into clinical practice, improving patient outcomes and enhancing critical care capabilities. The gradual adoption of these systems reflects a broader trend towards advanced medical technologies. Collaboration between medical device manufacturers and healthcare institutions is crucial for accelerating the deployment of ECCO2R technology, ensuring accessibility, and providing necessary clinical training.

Company Profiles

Key players in the South & Central America Extracorporeal CO2 Removal Devices 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 pursuing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative solutions to consumers.

Research Methodology

The report's data collection and analysis involved comprehensive secondary research, utilizing various sources such as company reports, industry publications, and government documents. Primary research included interviews with industry stakeholders to validate findings and gain insights into market dynamics, trends, and future prospects.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. EXTRACORPOREAL CO2 REMOVAL DEVICES MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 List of Vendors in the Value Chain

5. SOUTH & CENTRAL AMERICA EXTRACORPOREAL CO2 REMOVAL DEVICES MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. EXTRACORPOREAL CO2 REMOVAL DEVICES MARKET - SOUTH & CENTRAL

AMERICA MARKET ANALYSIS

6.1 South & Central America Extracorporeal CO2 Removal Devices Market Revenue (US\$ Million), 2024 - 2031

6.2 South & Central America Extracorporeal CO2 Removal Devices Market Forecast and Analysis

7. SOUTH & CENTRAL AMERICA EXTRACORPOREAL CO2 REMOVAL DEVICES MARKET REVENUE ANALYSIS - BY PRODUCT

7.1 Extracorporeal CO2 Devices

7.1.1 Overview

7.1.2 Extracorporeal CO2 Devices: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Consumables

7.2.1 Overview

7.2.2 Consumables: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. SOUTH & CENTRAL AMERICA EXTRACORPOREAL CO2 REMOVAL DEVICES MARKET REVENUE ANALYSIS - BY APPLICATION

8.1 Chronic Obstructive Pulmonary Disease (COPD)

8.1.1 Overview

8.1.2 Chronic Obstructive Pulmonary Disease (COPD): South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Acute Respiratory Distress Syndrome (ARDS)

8.2.1 Overview

8.2.2 Acute Respiratory Distress Syndrome (ARDS): South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Others

8.3.1 Overview

8.3.2 Others: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. SOUTH & CENTRAL AMERICA EXTRACORPOREAL CO2 REMOVAL DEVICES MARKET REVENUE ANALYSIS - BY END USER

9.1 Hospitals and Clinics

9.1.1 Overview

9.1.2 Hospitals and Clinics: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Ambulatory Surgical Centers

9.2.1 Overview

9.2.2 Ambulatory Surgical Centers: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3 Others

9.3.1 Overview

9.3.2 Others: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. SOUTH & CENTRAL AMERICA EXTRACORPOREAL CO2 REMOVAL DEVICES MARKET - COUNTRY ANALYSIS

10.1 South & Central America

10.1.1 South & Central America Extracorporeal CO2 Removal Devices Market Revenue and Forecast and Analysis - by Country

10.1.1.1 South & Central America Extracorporeal CO2 Removal Devices Market Revenue and Forecast and Analysis - by Country

10.1.2.2 Brazil: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.1.2.2.1 Brazil: South & Central America Extracorporeal CO2 Removal Devices Market Share - by Product

10.1.2.2.2 Brazil: South & Central America Extracorporeal CO2 Removal Devices Market Share - by Application

10.1.2.2.3 Brazil: South & Central America Extracorporeal CO2 Removal Devices Market Share - by End User

10.2.3.3 Argentina: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.2.3.3.1 Argentina: South & Central America Extracorporeal CO2 Removal Devices Market Share - by Product

10.2.3.3.2 Argentina: South & Central America Extracorporeal CO2 Removal Devices Market Share - by Application

10.2.3.3.3 Argentina: South & Central America Extracorporeal CO2 Removal Devices Market Share - by End User

10.3.4.4 Rest of South & Central America: South & Central America Extracorporeal

CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.3.4.4.1 Rest of South & Central America: South & Central America

Extracorporeal CO2 Removal Devices Market Share - by Product

10.3.4.4.2 Rest of South & Central America: South & Central America

Extracorporeal CO2 Removal Devices Market Share - by Application

10.3.4.4.3 Rest of South & Central America: South & Central America

Extracorporeal CO2 Removal Devices Market Share - by End User

11 COMPETITIVE LANDSCAPE

11.1 Heat Map Analysis by Key Players

11.2 Company Positioning & Concentration

12 INDUSTRY LANDSCAPE

12.1 Overview

12.2 New Product Development

12.3 Merger and Acquisition

12.4 Other Strategic Developments

13 COMPANY PROFILES

13.1 Terumo Corp

13.1.1 Key Facts

13.1.2 Business Description

13.1.3 Products and Services

13.1.4 Financial Overview

13.1.5 SWOT Analysis

13.1.6 Key Developments

13.2 Medtronic Plc

13.2.1 Key Facts

13.2.2 Business Description

13.2.3 Products and Services

13.2.4 Financial Overview

13.2.5 SWOT Analysis

13.2.6 Key Developments

13.3 Baxter International Inc

13.3.1 Key Facts

13.3.2 Business Description

- 13.3.3 Products and Services
- 13.3.4 Financial Overview
- 13.3.5 SWOT Analysis
- 13.3.6 Key Developments
- 13.4 LivaNova Plc
 - 13.4.1 Key Facts
 - 13.4.2 Business Description
 - 13.4.3 Products and Services
 - 13.4.4 Financial Overview
 - 13.4.5 SWOT Analysis
 - 13.4.6 Key Developments
- 13.5 Getinge AB
 - 13.5.1 Key Facts
 - 13.5.2 Business Description
 - 13.5.3 Products and Services
 - 13.5.4 Financial Overview
 - 13.5.5 SWOT Analysis
 - 13.5.6 Key Developments
- 13.6 Fresenius Medical Care AG & Co KGaA
 - 13.6.1 Key Facts
 - 13.6.2 Business Description
 - 13.6.3 Products and Services
 - 13.6.4 Financial Overview
 - 13.6.5 SWOT Analysis
 - 13.6.6 Key Developments
- 13.7 Eurosets SRL
 - 13.7.1 Key Facts
 - 13.7.2 Business Description
 - 13.7.3 Products and Services
 - 13.7.4 Financial Overview
 - 13.7.5 SWOT Analysis
 - 13.7.6 Key Developments
- 13.8 Aferetica s.r.l.
 - 13.8.1 Key Facts
 - 13.8.2 Business Description
 - 13.8.3 Products and Services
 - 13.8.4 Financial Overview
 - 13.8.5 SWOT Analysis
 - 13.8.6 Key Developments

13.9 Medica S.p.A.

13.9.1 Key Facts

13.9.2 Business Description

13.9.3 Products and Services

13.9.4 Financial Overview

13.9.5 SWOT Analysis

13.9.6 Key Developments

13.10 ESTOR S.P.A.

13.10.1 Key Facts

13.10.2 Business Description

13.10.3 Products and Services

13.10.4 Financial Overview

13.10.5 SWOT Analysis

13.10.6 Key Developments

14. APPENDIX

14.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. South & Central America Extracorporeal CO2 Removal Devices Market Segmentation

Table 2. List of Vendors

Table 3. South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product

Table 5. South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 6. South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 7. South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 8. Brazil: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product

Table 9. Brazil: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 10. Brazil: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 11. Argentina: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product

Table 12. Argentina: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 13. Argentina: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 14. Rest of South & Central America: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product

Table 15. Rest of South & Central America: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 16. Rest of South & Central America: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 17. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. South & Central America Extracorporeal CO2 Removal Devices Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: Extracorporeal CO2 Removal Devices Market

Figure 4. South & Central America Extracorporeal CO2 Removal Devices Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. South & Central America Extracorporeal CO2 Removal Devices Market Revenue (US\$ Million), 2024 - 2031

Figure 7. South & Central America Extracorporeal CO2 Removal Devices Market Share (%) - by Product, 2024 and 2031

Figure 8. Extracorporeal CO2 Devices: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Consumables: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. South & Central America Extracorporeal CO2 Removal Devices Market Share (%) - by Application, 2024 and 2031

Figure 11. Chronic Obstructive Pulmonary Disease (COPD): South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. Acute Respiratory Distress Syndrome (ARDS): South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. Others: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 14. South & Central America Extracorporeal CO2 Removal Devices Market Share (%) - by End User, 2024 and 2031

Figure 15. Hospitals and Clinics: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Ambulatory Surgical Centers: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. Others: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. South & Central America Extracorporeal CO2 Removal Devices Market

Breakdown by Key Countries, 2024 and 2031 (%)

Figure 19. Brazil: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Argentina: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. Rest of South & Central America: South & Central America Extracorporeal CO2 Removal Devices Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Company Positioning & Concentration

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