

Veno-Venous Extracorporeal Life Support Devices Market Size, Share and Growth Outlook 2026: By Product Type (Biventricular Devices, Single-Ventricular Devices), By Application, By Indication, By End-User, Companies to 2034.

<https://marketpublishers.com/r/V82EF258DC63EN.html>

Date: July 2026

Pages: 190

Price: US\$ 3,482.00 (Single User License)

ID: V82EF258DC63EN

Abstracts

The global Veno-Venous Extracorporeal Life Support Devices Market size is forecast to increase from \$480.68 Million in 2026 to \$745 Million in 2034 at a CAGR of 5.63% between 2026 and 2034.

The Veno-Venous Extracorporeal Life Support Devices market report provides detailed analysis and outlook of Veno-Venous Extracorporeal Life Support Devices segments including By Product Type (Biventricular Devices, Single-Ventricular Devices), By Application (Femoral Vein, Jugular Vein, Right Atrium, Others), By Indication (Acute Respiratory Distress Syndrome (ARDS), Severe Pneumonia, COPD Exacerbations, Post-Cardiac Surgery Respiratory Failure, Lung Transplant Support, Others), By End-User (Hospitals, Clinics, Ambulatory Surgical Centers, Cardiac Catheterization Laboratories, Others) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Veno-Venous Extracorporeal Life Support Devices Industry Overview

Advanced Extracorporeal Life Support Technologies Are Strengthening Critical Care

The global veno-venous extracorporeal life support (VV-ECLS) devices industry is advancing as hospitals expand intensive care capabilities for patients with severe respiratory failure, particularly acute respiratory distress syndrome (ARDS) and other

life-threatening pulmonary conditions. Growing adoption of extracorporeal membrane oxygenation (ECMO), improvements in portable life support systems, and increasing emphasis on integrated critical care workflows are driving technological innovation across the market. Healthcare providers are seeking compact, intelligent, and highly connected extracorporeal life support platforms that enable rapid deployment, safe patient transport, and continuous hemodynamic monitoring while supporting multidisciplinary critical care teams. Manufacturers are responding with advanced oxygenators, cardiopulmonary systems, and digital connectivity solutions that improve workflow efficiency and patient management.

Portable Platforms and Digital Integration Improve Critical Care Workflows

A major trend shaping the industry is the development of portable VV-ECLS systems capable of supporting critically ill patients across intensive care units and intra-hospital transport while maintaining seamless clinical data integration. Intelligent monitoring platforms are allowing clinicians to make faster therapeutic decisions through continuous access to real-time physiological information. Getinge reinforced this direction by advancing its Cardiohelp II Extracorporeal Life Support system, designed to support adults undergoing VV-ECMO while integrating with Talis software to facilitate automated hemodynamic data sharing across critical care networks. Such developments demonstrate the industry's broader transition toward digitally connected extracorporeal life support ecosystems that enhance patient monitoring and improve coordination among multidisciplinary care teams.

Manufacturing Expansion and Commercial Partnerships Strengthen Market Development

The industry is also witnessing strategic organizational expansion and commercial partnerships aimed at broadening access to advanced extracorporeal technologies. Companies are strengthening product portfolios and distribution networks to meet increasing demand from cardiac surgery centers and intensive care hospitals. LivaNova supported this trend through leadership expansion of its cardiopulmonary business overseeing oxygenators, heart-lung machines, autotransfusion technologies, and specialized cannula systems widely used during extracorporeal circulation and respiratory support. Eurosets further expanded market access following regulatory clearances for its Trilly oxygenator and Horizon reservoir systems while establishing a distribution partnership with Orion Medical to strengthen adoption of its ECMO and cardiopulmonary technologies across regional healthcare networks. These developments illustrate the industry's continued evolution toward integrated, digitally

connected, and clinically versatile VV-ECLS solutions that support modern critical care delivery.

Veno-Venous Extracorporeal Life Support Devices Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Veno-Venous Extracorporeal Life Support Devices market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Getinge AB (Maquet Holding), Medtronic plc, LivaNova PLC (Sorin Group), Terumo Corporation (Terumo Cardiovascular Systems), Nipro Corporation (Nipro Medical), MicroPort Scientific Corporation, Fresenius Medical Care AG, Xenios AG (Fresenius Medical Care), Medos Medizintechnik GmbH (Xenios), Eurosets S.r.l.. The Veno-Venous Extracorporeal Life Support Devices market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Veno-Venous Extracorporeal Life Support Devices industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Veno-Venous Extracorporeal Life Support Devices Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Veno-Venous Extracorporeal Life Support Devices companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Veno-Venous Extracorporeal Life Support Devices markets

- Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Veno-Venous Extracorporeal Life Support Devices Market Competitive Benchmarking and Company Analysis

Leading companies in Veno-Venous Extracorporeal Life Support Devices industry include- Getinge AB (Maquet Holding), Medtronic plc, LivaNova PLC (Sorin Group), Terumo Corporation (Terumo Cardiovascular Systems), Nipro Corporation (Nipro Medical), MicroPort Scientific Corporation, Fresenius Medical Care AG, Xenios AG (Fresenius Medical Care), Medos Medizintechnik GmbH (Xenios), Eurosets S.r.l.. The Veno-Venous Extracorporeal Life Support Devices market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Veno-Venous Extracorporeal Life Support Devices Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Veno-Venous Extracorporeal Life Support Devices market remains one of the strongest-performing segments in the country.

The US Veno-Venous Extracorporeal Life Support Devices Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Veno-Venous Extracorporeal Life Support Devices market faces successive waves of challenging

trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Veno-Venous Extracorporeal Life Support Devices industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Veno-Venous Extracorporeal Life Support Devices markets

Canada's strong Veno-Venous Extracorporeal Life Support Devices sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Veno-Venous Extracorporeal Life Support Devices market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Veno-Venous Extracorporeal Life Support Devices Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Veno-Venous Extracorporeal Life Support Devices market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Veno-Venous Extracorporeal Life Support Devices population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Veno-Venous Extracorporeal Life Support Devices industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Veno-Venous Extracorporeal Life Support Devices market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare

system, high public healthcare expenditure, and strong government support Venous Extracorporeal Life Support Devices sales through 2034

France Venous Extracorporeal Life Support Devices companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Venous Extracorporeal Life Support Devices Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Venous Extracorporeal Life Support Devices distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Venous Extracorporeal Life Support Devices Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Venous Extracorporeal Life Support Devices market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing

primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Veno-Venous Extracorporeal Life Support Devices industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Veno-Venous Extracorporeal Life Support Devices industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Veno-Venous Extracorporeal Life Support Devices Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Veno-Venous Extracorporeal Life Support Devices market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Veno-Venous Extracorporeal Life Support Devices market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Veno-Venous Extracorporeal Life Support Devices Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending.

Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Veno-Venous Extracorporeal Life Support Devices Market Segmentation

By Product Type

Biventricular Devices

Single-Ventricular Devices

By Application

Femoral Vein

Jugular Vein

Right Atrium

Others

By Indication

Acute Respiratory Distress Syndrome (ARDS)

Severe Pneumonia

COPD Exacerbations

Post-Cardiac Surgery Respiratory Failure

Lung Transplant Support

Others

By End-User

Hospitals

Clinics

Ambulatory Surgical Centers

Cardiac Catheterization Laboratories

Others

Leading Companies in Veno-Venous Extracorporeal Life Support Devices Industry
(2026)

Getinge AB (Maquet Holding)

Medtronic plc

LivaNova PLC (Sorin Group)

Terumo Corporation (Terumo Cardiovascular Systems)

Nipro Corporation (Nipro Medical)

MicroPort Scientific Corporation

Fresenius Medical Care AG

Xenios AG (Fresenius Medical Care)

Medos Medizintechnik GmbH (Xenios)

Eurosets S.r.l.

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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Contents

CHAPTER 1- EXECUTIVE SUMMARY

- 1.1. Market Snapshot: Market Size, CAGR, and Growth Outlook to 2034
- 1.2. Key Industry Highlights, 2026
- 1.3. Premium Market Insights
 - 1.3.1. Potential Veno-Venous Extracorporeal Life Support Devices Market Types and Applications
 - 1.3.2. Fastest Growing Countries Over the forecast period
- 1.4. Market Scope and Segmentation
 - 1.4.1. Key Market Segments
 - 1.4.2. Key Countries and Regions
 - 1.4.3. Top Companies in the Veno-Venous Extracorporeal Life Support Devices Industry
- 1.5. Macroeconomic and Demographic Outlook
 - 1.5.1. GDP Outlook by Top 20 Countries, 2010- 2040
 - 1.5.2. Population Forecast by Country, 2010- 2040
 - 1.5.3. Inflation Trends in Leading Countries
- 1.6. Impact of Trade Policies, Regulations, and Sustainability
 - 1.6.1. Trade tariffs and localization requirements
 - 1.6.2. ESG and sustainability pressures
 - 1.6.3. Compliance-driven structural changes in the value chain

CHAPTER 2- RESEARCH METHODOLOGY

- 2.1. Report Coverage
- 2.2. Secondary Research
- 2.3. Primary Research
- 2.4. Data Triangulation
- 2.5. Market Modeling and Forecasting

CHAPTER 3- GLOBAL VENO-VEINOUS EXTRACORPOREAL LIFE SUPPORT DEVICES MARKET TRENDS, GROWTH DRIVERS, CHALLENGES, AND OPPORTUNITIES THROUGH 2034

- 3.1. An Introduction to Global Veno-Venous Extracorporeal Life Support Devices Markets in 2026
- 3.2. Global Historic and Forecast Veno-Venous Extracorporeal Life Support Devices

Market Size Outlook, USD Million, 2021- 2034

3.3. Annual Market Size Growth Rate (Y-o-Y), %, 2021-2034

3.4. Market Dynamics

3.4.1. Key Veno-Venous Extracorporeal Life Support Devices Market Driving Forces and Their Impact on Market Outlook

3.4.2. Short and Long-Term Trends and Insights Shaping the Future

3.4.3. Potential Veno-Venous Extracorporeal Life Support Devices Market Opportunities for Industry Stakeholders

3.4.4. Potential Challenges across Veno-Venous Extracorporeal Life Support Devices Value Chain

CHAPTER 4- VENO-VENOUS EXTRACORPOREAL LIFE SUPPORT DEVICES MARKET COMPETITIVE LANDSCAPE, STRATEGIC ANALYSIS, AND VALUE CHAIN ASSESSMENT

4.1. Porter's Five Forces Analysis

4.1.1. Bargaining Power of Buyers

4.1.2. Bargaining Power of Suppliers

4.1.3. Threat of Substitutes

4.1.4. Threat of New Entrants

4.1.5. Intensity of Competitive Rivalry

4.1.6. Market Attractiveness Analysis by Segment

4.1.7. Market Attractiveness Analysis by Region

4.2. Competitive Landscape

4.2.1 Market Share Analysis of Leading Veno-Venous Extracorporeal Life Support Devices Companies

4.2.2 Recent Strategic Developments

4.2.3 Mergers, Acquisitions, and Partnerships

4.2.4 Product Launches and Innovation Trends

4.2.5 Key Success Factors

4.3. Value Chain Analysis

4.3.1. Key Value Chain Segments

4.3.2. Dominant players by value-chain stage

4.4. SWOT Analysis

4.4.1. Key Strengths and Opportunities

4.4.2. Major Weaknesses and Threats

4.5 Technology Roadmap

4.6 Regulatory and Reimbursement Landscape

CHAPTER 5- VENO-VEINUS EXTRACORPOREAL LIFE SUPPORT DEVICES MARKET OUTLOOK BY SEGMENTS

- 5.1. Market Size Outlook by Type, USD Million, 2021- 2025 and 2026-2034
- 5.2. Market Size Outlook by Application, USD Million, 2021- 2025 and 2026-2034
- 5.3. Market Size Outlook by Country, USD Million, 2021- 2025 and 2026-2034
- By Product Type
 - Biventricular Devices
 - Single-Ventricular Devices
- By Application
 - Femoral Vein
 - Jugular Vein
 - Right Atrium
 - Others
- By Indication
 - Acute Respiratory Distress Syndrome (ARDS)
 - Severe Pneumonia
 - COPD Exacerbations
 - Post-Cardiac Surgery Respiratory Failure
 - Lung Transplant Support
 - Others
- By End-User
 - Hospitals
 - Clinics
 - Ambulatory Surgical Centers
 - Cardiac Catheterization Laboratories
 - Others

CHAPTER 6- SCENARIO ANALYSIS AND OUTLOOK

- 6.1. Base Case Scenario
 - 6.1.1. Definitions and Insights
 - 6.1.2. Market Size Outlook to 2034
- 6.2. Low Growth Case Scenario
 - 6.2.1. Definitions and Insights
 - 6.2.2. Market Size Outlook to 2034
- 6.3. High Growth Case Scenario
 - 6.3.1. Definitions and Insights
 - 6.3.2. Market Size Outlook to 2034

CHAPTER 7- NORTH AMERICA VENO-VENOUS EXTRACORPOREAL LIFE SUPPORT DEVICES MARKET SIZE ANALYSIS AND OUTLOOK

- 7.1. North America Veno-Venous Extracorporeal Life Support Devices Market Overview, 2026
- 7.2. Leading Companies Operating in North America
- 7.3. Key Industry Statistics, 2026
- 7.4. North America Veno-Venous Extracorporeal Life Support Devices Market Trends and Growth Opportunities to 2034
- 7.5. North America Veno-Venous Extracorporeal Life Support Devices Market Size Outlook by Type
- 7.6. North America Veno-Venous Extracorporeal Life Support Devices Market Size Outlook by Application
- 7.7. North America Veno-Venous Extracorporeal Life Support Devices Market Size Outlook by Country
- 7.8. United States
 - 7.8.1. Key Statistics
 - 7.8.2. The US Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034
 - 7.8.3. Key Market Drivers and Industry Developments in the US Veno-Venous Extracorporeal Life Support Devices Companies
- 7.9. Canada
 - 7.9.1. Key Statistics
 - 7.9.2. Canada Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034
 - 7.9.3. Key Market Drivers and Industry Developments in Canada Veno-Venous Extracorporeal Life Support Devices Companies
- 7.10. Mexico
 - 7.10.1. Key Statistics
 - 7.10.2. Mexico Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034
 - 7.10.3. Key Market Drivers and Industry Developments in Mexico Veno-Venous Extracorporeal Life Support Devices Companies

CHAPTER 8- EUROPE VENO-VENOUS EXTRACORPOREAL LIFE SUPPORT DEVICES MARKET SIZE ANALYSIS AND OUTLOOK

- 8.1. Europe Veno-Venous Extracorporeal Life Support Devices Market Overview, 2026

8.2. Leading Companies Operating in Europe

8.3. Key Industry Statistics, 2026

8.4. Europe Veno-Venous Extracorporeal Life Support Devices Market Trends and Growth Opportunities to 2034

8.5. Europe Veno-Venous Extracorporeal Life Support Devices Market Size Outlook by Type

8.6. Europe Veno-Venous Extracorporeal Life Support Devices Market Size Outlook by Application

8.7. Europe Veno-Venous Extracorporeal Life Support Devices Market Size Outlook by Country

8.8. Germany

8.8.1. Key Statistics

8.8.2. Germany Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

8.8.3. Key Market Drivers and Industry Developments in Germany Veno-Venous Extracorporeal Life Support Devices Companies

8.9. France

8.9.1. Key Statistics

8.9.2. France Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

8.9.3. Key Market Drivers and Industry Developments in France Veno-Venous Extracorporeal Life Support Devices Companies

8.10. United Kingdom

8.10.1. Key Statistics

8.10.2. United Kingdom Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

8.10.3. Key Market Drivers and Industry Developments in the UK Veno-Venous Extracorporeal Life Support Devices Companies

8.11. Spain

8.11.1. Key Statistics

8.11.2. Spain Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

8.11.3. Key Market Drivers and Industry Developments in Spain Veno-Venous Extracorporeal Life Support Devices Companies

8.12. Italy

8.12.1. Key Statistics

8.12.2. Italy Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

8.12.3. Key Market Drivers and Industry Developments in Italy Veno-Venous

Extracorporeal Life Support Devices Companies

8.13. Rest of Europe

8.13.1. Key Statistics

8.13.2. Rest of Europe Venous-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

8.13.3. Key Market Drivers and Industry Developments in Rest of Europe Venous-Venous Extracorporeal Life Support Devices Companies

CHAPTER 9- ASIA PACIFIC VENOUS-VENOUS EXTRACORPOREAL LIFE SUPPORT DEVICES MARKET SIZE ANALYSIS AND OUTLOOK

9.1. Asia Pacific Venous-Venous Extracorporeal Life Support Devices Market Overview, 2026

9.2. Leading Companies Operating in Asia Pacific

9.3. Key Industry Statistics, 2026

9.4. Asia Pacific Venous-Venous Extracorporeal Life Support Devices Market Trends and Growth Opportunities to 2034

9.5. Asia Pacific Venous-Venous Extracorporeal Life Support Devices Market Size Outlook by Type

9.6. Asia Pacific Venous-Venous Extracorporeal Life Support Devices Market Size Outlook by Application

9.7. Asia Pacific Venous-Venous Extracorporeal Life Support Devices Market Size Outlook by Country

9.8. China

9.8.1. Key Statistics

9.8.2. China Venous-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

9.8.3. Key Market Drivers and Industry Developments in China Venous-Venous Extracorporeal Life Support Devices Companies

9.9. Japan

9.9.1. Key Statistics

9.9.2. Japan Venous-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

9.9.3. Key Market Drivers and Industry Developments in Japan Venous-Venous Extracorporeal Life Support Devices Companies

9.10. India

9.10.1. Key Statistics

9.10.2. India Venous-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

9.10.3. Key Market Drivers and Industry Developments in India Venovenous Extracorporeal Life Support Devices Companies

9.11. South Korea

9.11.1. Key Statistics

9.11.2. South Korea Venovenous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

9.11.3. Key Market Drivers and Industry Developments in South Korea Venovenous Extracorporeal Life Support Devices Companies

9.12. Australia

9.12.1. Key Statistics

9.12.2. Australia Venovenous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

9.12.3. Key Market Drivers and Industry Developments in Australia Venovenous Extracorporeal Life Support Devices Companies

9.13. Southeast Asia

9.13.1. Key Statistics

9.13.2. Southeast Asia Venovenous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

9.13.3. Key Market Drivers and Industry Developments in Southeast Asia Venovenous Extracorporeal Life Support Devices Companies

CHAPTER 10- SOUTH AND CENTRAL AMERICA VENOVENOUS EXTRACORPOREAL LIFE SUPPORT DEVICES MARKET SIZE ANALYSIS AND OUTLOOK

10.1. South and Central America Venovenous Extracorporeal Life Support Devices Market Overview, 2026

10.2. Leading Companies Operating in South and Central America

10.3. Key Industry Statistics, 2026

10.4. South and Central America Venovenous Extracorporeal Life Support Devices Market Trends and Growth Opportunities to 2034

10.5. South and Central America Venovenous Extracorporeal Life Support Devices Market Size Outlook by Type

10.6. South and Central America Venovenous Extracorporeal Life Support Devices Market Size Outlook by Application

10.7. South and Central America Venovenous Extracorporeal Life Support Devices Market Size Outlook by Country

10.8. Brazil

10.8.1. Key Statistics

10.8.2. Brazil Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

10.8.3. Key Market Drivers and Industry Developments in Brazil Veno-Venous Extracorporeal Life Support Devices Companies

10.9. Argentina

10.9.1. Key Statistics

10.9.2. Argentina Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

10.9.3. Key Market Drivers and Industry Developments in Argentina Veno-Venous Extracorporeal Life Support Devices Companies

10.10. Rest of Latin America

10.10.1. Key Statistics

10.10.2. Rest of Latin America Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

10.10.3. Key Market Drivers and Industry Developments in Rest of Latin America Veno-Venous Extracorporeal Life Support Devices Companies

CHAPTER 11- MIDDLE EAST AND AFRICA VENO-VENOUS EXTRACORPOREAL LIFE SUPPORT DEVICES MARKET SIZE ANALYSIS AND OUTLOOK

11.1. Middle East and Africa Veno-Venous Extracorporeal Life Support Devices Market Overview, 2026

11.2. Leading Companies Operating in Middle East and Africa

11.3. Key Industry Statistics, 2026

11.4. Middle East and Africa Veno-Venous Extracorporeal Life Support Devices Market Trends and Growth Opportunities to 2034

11.5. Middle East and Africa Veno-Venous Extracorporeal Life Support Devices Market Size Outlook by Type

11.6. Middle East and Africa Veno-Venous Extracorporeal Life Support Devices Market Size Outlook by Application

11.7. Middle East and Africa Veno-Venous Extracorporeal Life Support Devices Market Size Outlook by Country

11.8. Saudi Arabia

11.8.1. Key Statistics

11.8.2. Saudi Arabia Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

11.8.3. Key Market Drivers and Industry Developments in Saudi Arabia Veno-Venous Extracorporeal Life Support Devices Companies

11.9. United Arab Emirates

11.9.1. Key Statistics

11.9.2. The UAE Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

11.9.3. Key Market Drivers and Industry Developments in the UAE Veno-Venous Extracorporeal Life Support Devices Companies

11.10. Africa

11.10.1. Key Statistics

11.10.2. Africa Veno-Venous Extracorporeal Life Support Devices Market Size Outlook, 2021- 2034

11.10.3. Key Market Drivers and Industry Developments in Africa Veno-Venous Extracorporeal Life Support Devices Companies

CHAPTER 12- COMPANY PROFILES

12.1. Top Companies in Veno-Venous Extracorporeal Life Support Devices Industry

Getinge AB (Maquet Holding)

Medtronic plc

LivaNova PLC (Sorin Group)

Terumo Corporation (Terumo Cardiovascular Systems)

Nipro Corporation (Nipro Medical)

MicroPort Scientific Corporation

Fresenius Medical Care AG

Xenios AG (Fresenius Medical Care)

Medos Medizintechnik GmbH (Xenios)

Eurosets S.r.l.

12.2. Business Description

12.3. SWOT Profiles

12.4. Products and Services

CHAPTER 13- APPENDIX

Glossary of Terms

Research Methodology & Data Sources

Conclusion & Strategic Recommendations

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