

## **Extra Corporeal Membrane Oxygenation (ECMO) System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The extracorporeal membrane oxygenation (ECMO) system market is projected to register a CAGR of 4.71% over the forecast period.

COVID-19 significantly impacted the market growth. For instance, according to an article published in BioMed Central, in September 2021, mortality for ECMO-supported patients with COVID-19 significantly worsened worldwide throughout the pandemic, and the duration of ECMO support increased. These unpredictable results necessitated ongoing monitoring, understanding of local and regional death rates, the length of ECMO support, and possible resource limitations. Also, the risk of severe COVID-19 in people with asthma was relatively small. Still, people with chronic obstructive pulmonary disorders and interstitial lung disease had a moderate risk of severe disease due to COVID-19. Thus, the pandemic impacted market growth during the pandemic. However, with removed restrictions and trade barriers, the supply chain of ECMO machines increased, further propelling the market growth.

Factors such as the increasing prevalence of cardiovascular and respiratory diseases, technological advancements in ECMO technology, and increased adoption of ECMO systems are expected to boost market growth over the forecast period.

The increasing burden of respiratory and cardiovascular disease among the population increased the demand for ECMO systems due to insufficient oxygen supply to the body. For instance, according to the study published in the PLOS One journal in January 2021, it was observed that about 2.6 million people were suffering from chronic obstructive pulmonary disease (COPD) in France, and this number is expected to rise to 2.8 million by 2025. Additionally, according to the 2022 statistics published by the Australian Bureau of Statistics, the prevalence of heart disease in Australia was 4.0% in 2020-2021, which equates to about 1 million people.

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Furthermore, hospitals' rising adoption of ECMO machines increased their demand, which is also expected to fuel the market growth over the forecast period. For instance, as per an article published in NLM in April 2022, it was observed that 151,683 patients, including 45,205 newborns, 30,743 children, and 75,735 adults, received ECMO treatment during the pandemic period. In addition, 492 centers and hospitals adopted ECMO machines during the pandemic.

Moreover, the rising product launches increase the availability of technologically advanced ECMO systems in the market. It is expected to fuel the market growth over the forecast period. For instance, in October 2021, Getinge launched the Rotaflow II Extracorporeal Life Support (ECLS) System with the Permanent Life Support (PLS) Set, which offers up to 14 days of cardiopulmonary support in a compact, portable, safe, and reliable manner. It gives healthcare staff the flexibility they need to provide quality patient care.

Therefore, the studied market is expected to grow over the forecast period due to the factors above, such as the high burden of cardiopulmonary diseases, the growing adoption of ECMO systems, and increasing product launches. However, the high cost of ECMO procedures and the risk associated with ECMO systems will likely impede the growth of the extracorporeal membrane oxygenation (ECMO) system market over the forecast period.

#### Extra Corporeal Membrane Oxygenation (ECMO) System Market Trends

##### Respiratory Applications is Expected to Witness Significant Growth Over the Forecast Period

The respiratory segment is expected to witness significant growth in the extracorporeal membrane oxygenation (ECMO) system market over the forecast period owing to factors such as the increasing burden of respiratory diseases among the population and growing company activities.

The rising prevalence and incidence of respiratory diseases, such as asthma, chronic obstructive pulmonary disease (COPD), pulmonary fibrosis, pneumonia, and lung cancer, among the population is the key factor driving the demand for ECMO machines. For instance, according to the data published by the CDC, in December 2022, about 4.6% of individuals had received a COPD, emphysema, or chronic bronchitis diagnosis at some point in 2021. Also, according to an article published in ERS Journal in August 2022, it was projected that about 645.6 million people (454.4 million men and 191.2 million women) are expected to experience COPD by 2050, representing a 36% relative increase in global prevalence as compared to the previous year. Similarly, according to the 2022 statistics published by the National Cancer Registry Programme, about 1,03,371 new lung cancer cases were reported in India in 2022 as compared to 98,278 during the last year.

Furthermore, as per the study published in ASAIO Journal in April 2022, it was observed that eight-three adult patients had dynamic or hybrid ECMO configurations. Their primary diagnoses included cardiogenic shock (33.7%), cardiac arrest (6.0%), acute respiratory failure (39.8%), septic shock (9.6%), multiple trauma (3.6%), pulmonary hypertension (3.6%), and others (3.6%). Also, the study concluded that dynamic or hybrid configurations for extracorporeal membrane oxygenation (ECMO) are needed when patient physiology or clinical conditions change. Thus, the increasing adoption of membrane oxygenators during physiological or clinical conditions change is expected to boost the growth of the studied market over the forecast period.

Moreover, the rising product launches are also contributing to segment growth. For instance, in November 2022, LivaNova PLC received the United States FDA approval for its extracorporeal membrane oxygenation (ECMO). LifeSPARC is a next-generation Advanced Circulatory Support (ACS) pump and controller system for cardiopulmonary bypass.

Therefore, the studied segment is expected to grow over the forecast period due to the factors above, such as the high burden of respiratory diseases, the growing adoption of ECMO systems, and increasing product launches.

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## North America is Expected to include the Significant Market Share Over the Forecast Period

North America is expected to hold a significant market share over the forecast period owing to its increasing prevalence of cardiovascular and respiratory diseases, advancements in ECMO technology, and increased adoption of ECMO systems.

The increasing burden of cardiovascular diseases and their associated risk factors, such as high blood pressure, obesity, type-2 diabetes, and poor dietary habits, increased the population's risk of developing chronic heart diseases, propelling market growth. For instance, as per 2022 statistics published by IDF, about 2.9 million people were living with diabetes in 2021 in Canada. In addition, as per the same source, this number is projected to reach 3.2 million by 2030 and 3.4 million by 2045. Therefore, high blood sugar caused by diabetes can damage the nerves that control the heart and blood vessels, leading to cardiovascular diseases like coronary artery disease and stroke, narrowing the arteries and necessitating coronary artery bypass procedures. These procedures call for life support systems, projected to enhance demand for ECMO machines and spur market expansion.

In addition, the increasing geriatric population is more prone to developing cardiopulmonary diseases, which may lead to surgeries. It increases the demand for ECMO systems, fueling the market growth over the forecast period. For instance, as per 2022 statistics published by UNPF, about 17% and 19% of the United States and Canadian population was 65 years and above in 2022.

Furthermore, as per 2022 statistics published by the Government of Canada, about 3,830,200 population aged 12 years and over were current, daily, or occasional smokers in Canada in 2021. Also, as per 2022 statistics published by WHO, West Virginia includes the highest smoking rate at 23.8%, followed by Kentucky at 23.6%, Louisiana at 21.9%, and Ohio at 20.8% in 2022. Thus, the high number of smokers in the region are at high risk of developing various lung diseases such as COPD. It, in turn, raises the demand for respiratory life support systems, hence propelling the market growth.

Moreover, the growing number of new product launches and approvals are also contributing to the market growth in the region. For instance, in July 2022, Inspira Technologies revealed its Liby System, an advanced form of life support extracorporeal membrane oxygenation (ECMO) used to treat patients with life-threatening heart and lung failure. The system is expected to be submitted to the United States Food and Drug Administration (FDA) for approval during the first half of 2023.

Therefore, the studied market is expected to grow over the forecast period due to the above factors, such as the high burden of cardiovascular and respiratory diseases and increasing product launches.

## Extra Corporeal Membrane Oxygenation (ECMO) System Industry Overview

The extracorporeal membrane oxygenation (ECMO) system market is competitive and includes several key players. Some of the key companies in the market are LivaNova (Alung Technologies Inc.), Eurosets, Getinge AB, Medtronic PLC, Microport Scientific Corporation, Nipro Medical Corporation, Terumo Medical Corporation, Abbott Laboratories, and Fresenius Medical Care Company (Xenios AG) among others.

### Additional Benefits:

- <ul> <li> The market estimate (ME) sheet in Excel format </li>
- <li> 3 months of analyst support </li> </ul>

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