

# Global Lung Biopsy Systems Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Lung Biopsy Systems market size is expected to reach \$ 11005 million by 2032, rising at a market growth of 13.4% CAGR during the forecast period (2026-2032).

Lung Biopsy Systems refer to a set of diagnostic equipment used to safely obtain lung tissue or cytology specimens when evaluating suspicious pulmonary lesions or diffuse lung diseases, typically under endoscopic visualization and or imaging based navigation guidance. A typical system combines a bronchoscope or percutaneous sampling instrument, navigation and localization software or a robotic platform, sampling consumables, and supporting energy or processing units. The scope of this research includes transbronchial biopsy forceps and other miniature sampling tools used in conventional or interventional bronchoscopy, cryobiopsy workstations and cryoprobes used for transbronchial cryobiopsy, lung navigation systems that integrate modalities such as electromagnetic navigation and fluoroscopic guidance, and robotic assisted bronchoscopy platforms designed to reach peripheral lung nodules and support tool in lesion confirmation. It may also be extended to include core needle biopsy instruments used for sampling soft tissues such as the lung. This research excludes the surgical service of open or thoracoscopic lung biopsy, laboratory pathology testing and staining consumables, and standalone imaging equipment such as CT or ultrasound systems. Core use cases include lesion characterization after lung cancer screening, histologic confirmation of peripheral small nodules or ground glass nodules, sampling for mediastinal and hilar staging, and tissue acquisition for interstitial lung disease. The value of these systems lies in improving reach and sample yield, reducing repeat punctures and complication risks, lowering cross infection risk and turnaround costs through single use bronchoscopes and consumable kits, and enabling repeatable standardized workflows and recurring consumable revenues supported by software and robotic assistance. Key customers include tertiary hospitals in pulmonology and thoracic

surgery, cancer centers and interventional radiology departments, and specialty clinics that run pulmonary nodule programs and day case procedures. Commercial delivery is commonly structured as capital equipment plus single use consumables or service contracts, and can also incorporate subscription based software modules for navigation planning and data management.

Under the expansion of pulmonary nodule screening and rising demand for early diagnosis, Lung Biopsy Systems are evolving from single sampling tools into end to end solutions centered on reach and confirmation. Robotic assisted bronchoscopy platforms combine stable steerability and distal control with navigation modalities such as shape sensing or imaging fusion, enabling more reliable access to peripheral airways and small nodules that are difficult to reach with conventional bronchoscopes. They embed sampling and tool in lesion confirmation into one workflow, improving diagnostic yield and shortening the path from imaging detection to histologic confirmation. In parallel, electromagnetic and fluoroscopic navigation systems provide a lower barrier pathway in cost and deployment, enhancing localization and route planning without replacing existing bronchoscopy infrastructure, allowing more hospitals to adopt minimally invasive sampling for peripheral lesions. As clinicians increasingly prioritize procedural consistency and learning curve, manufacturers are pushing standardized software workflows, training programs, and matched consumable sets, shifting the field from expert experience driven practice toward device and data driven practice. A key clinical pain point is that smaller and more peripheral lesions are harder to stabilize due to scope bending and recoil, leading to failed sampling or repeated attempts. Shape sensing style navigation reduces reliance on fluoroscopy by providing real time catheter shape and location feedback and can link with CT based airway reconstruction to maintain route consistency in complex branching airways. For hospital operators, the value extends beyond per case yield to include room throughput, reduced anesthesia and length of stay, and measurable quality metrics that support multi center collaboration and research.

Sample quality and safety remain the core competitive dimensions, and consumable innovation directly determines achievable tissue volume and complication control. Conventional biopsy forceps are mature and broadly applicable in bronchoscopy, supporting rapid sampling for central airway disease and selected peripheral targets. To meet the need for larger tissue pieces in interstitial lung disease and peripheral nodules, transbronchial cryobiopsy leverages cryoadhesion to preserve tissue architecture, creating a high value consumable chain built around cryosurgical workstations and single use or reusable cryoprobes. For the percutaneous route, core needle biopsy instruments can provide standardized cylindrical tissue specimens in soft tissues such

as the lung, enabling fast confirmation under imaging guidance, while requiring robust pathway planning and complication management. Single use bronchoscopes and compatible sampling instruments are becoming an important complement, reducing cross infection risk and enabling more stable equipment availability and predictable costs in high throughput units. On the consumables side, manufacturers are improving jaw geometry, opening angle, sheath coating straightness, and rotatable handle structures to increase sampling efficiency and reduce mucosal trauma. Some products use color coding and specification systems to differentiate anatomical applications and working channel compatibility, supporting inventory management and nursing setup. Cryobiopsy emphasizes repeatable freeze timing and probe diameter selection, and protective oversheaths can protect scope channels during extraction and reduce thermal damage risk. For percutaneous biopsy, combinations of automatic or semi automatic firing mechanisms with coaxial needle systems help maintain the pathway while enabling multiple passes, increasing diagnostic information per procedure. With accumulating guidelines and evidence, hospitals are more likely to adopt a stratified approach by lesion type, driving coexistence of multiple techniques rather than one technology fully replacing another.

Commercially, Lung Biopsy Systems typically grow through a hybrid model of capital platforms plus recurring consumables. Navigation systems and robotic platforms drive upfront capital purchases, while high frequency consumables such as biopsy forceps, needles, and cryoprobes sustain recurring revenue and incentivize ecosystem optimization. Future growth is expected from three areas, deeper penetration of AI and software in pre procedure planning, intra procedure correction, and reporting and data management, higher sampling volumes driven by the expanding screened population and rising peripheral small nodule detection, and procurement mix shifts driven by the growing adoption of single use endoscopes and consumable kits. From a policy and compliance perspective, tighter requirements on quality systems and infection control will further encourage the use of single use devices and traceable consumables. In manufacturing geography, the US and Europe retain advantages in robotic systems and navigation algorithm platforms, while China, Japan, and Korea are strengthening supply capability in single use endoscopy and endoscopic consumables. In sales geography, North America and Europe are likely to continue leading high end platform installations due to mature screening and interventional pulmonology pathways, while Asia Pacific is positioned as a key incremental market supported by hospital capacity expansion and domestic substitution. In tendering and reimbursement environments, more institutions are incorporating Lung Biopsy Systems into early detection and treatment pathways, building closed loops from screening imaging to follow up and tissue confirmation. Manufacturers reduce post installation friction through interoperability with

bronchoscopy towers, fluoroscopy and ultrasound equipment, and through training and service offerings. On the supply chain side, capabilities in key components such as high precision sensors and single use insertion tubes will shape cost curves and may improve accessibility in lower tier markets as scale increases. Competition may evolve along two parallel routes, a high end integrated route centered on robotics and navigation platforms, and a high throughput route centered on single use endoscopy plus standardized consumable bundles, with both developing in parallel across regions and hospital tiers.

This report studies the global Lung Biopsy Systems demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Lung Biopsy Systems, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Lung Biopsy Systems that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Lung Biopsy Systems total market, 2021-2032, (USD Million)

Global Lung Biopsy Systems total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Lung Biopsy Systems total market, key domestic companies, and share, (USD Million)

Global Lung Biopsy Systems revenue by player, revenue and market share 2021-2026, (USD Million)

Global Lung Biopsy Systems total market by Type, CAGR, 2021-2032, (USD Million)

Global Lung Biopsy Systems total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Lung Biopsy Systems market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of

this study include Intuitive Surgical, Inc., Johnson & Johnson MedTech (Ethicon), Medtronic plc, Olympus Corporation, ERBE Elektromedizin GmbH, Ambu A/S, Boston Scientific Corporation, Cook Medical LLC, KARL STORZ SE & Co. KG, Technowood Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Lung Biopsy Systems market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

#### Global Lung Biopsy Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Lung Biopsy Systems Market, Segmentation by Type:

Needle Biopsy

Thoracoscopic Biopsy

Transbronchial Biopsy

#### Global Lung Biopsy Systems Market, Segmentation by Access Route:

Bronchoscopic

Percutaneous

#### Global Lung Biopsy Systems Market, Segmentation by Navigation Modality:

No Navigation

Electromagnetic Navigation

Robotic Navigation

Shape Sensing

#### Global Lung Biopsy Systems Market, Segmentation by Application:

Hospitals

Cancer Research Centers

Specialty Clinics

Others

#### Companies Profiled:

Intuitive Surgical, Inc.

Johnson & Johnson MedTech (Ethicon)

Medtronic plc

Olympus Corporation

ERBE Elektromedizin GmbH

Ambu A/S

Boston Scientific Corporation

Cook Medical LLC

KARL STORZ SE & Co. KG

Technowood Co., Ltd.

Sumitomo Bakelite Co., Ltd.

HOYA Corporation (PENTAX Medical)

FINEMEDIX CO., LTD.

Upex-Med Corp.

Medcare Medical (Medcare Medical Co., Ltd.)

Argon Medical Devices, Inc.

Becton, Dickinson and Company (BD)

Hunan Vathin Medical Instrument Co., Ltd.

Shanghai Aohua Photoelectricity Endoscope Co., Ltd.

SonoScape Medical Corp.

Shenzhen Mindray Bio-Medical Electronics Co., Ltd.

Jiangsu Vedkang Medical Science and Technology Co., Ltd.

Zhuji Peng Tian Medical Instrument Co.,Ltd

#### Key Questions Answered

1. How big is the global Lung Biopsy Systems market?
2. What is the demand of the global Lung Biopsy Systems market?
3. What is the year over year growth of the global Lung Biopsy Systems market?
4. What is the total value of the global Lung Biopsy Systems market?
5. Who are the Major Players in the global Lung Biopsy Systems market?
6. What are the growth factors driving the market demand?

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