

Sentinel Lymph Node Biopsy Imaging Agents Market Size, Share & Trends Analysis Report By Product (Radioactive Tracers, Dye-Based Agents), By Application (Breast Cancer, Melanoma), By Procedure, By End Use, By Region, And Segment Forecasts, 2026 - 2033

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Abstracts

The global sentinel lymph node biopsy imaging agents market size was estimated at USD 101.48 million in 2025 and is projected to reach USD 184.10 million by 2033, growing at a CAGR of 7.96% from 2026 to 2033, primarily driven by the rising global burden of cancer, particularly breast cancer and melanoma, which increases the need for accurate staging and lymphatic mapping techniques. As healthcare systems increasingly shift toward minimally invasive diagnostic procedures, sentinel lymph node biopsy imaging agents (SLNB) is preferred over full lymph node dissection due to reduced complications and faster recovery, thereby boosting demand for imaging agents.

Moreover, technological advancements in radiotracers, fluorescent dyes, and hybrid imaging agents are significantly improving detection accuracy and surgical outcomes, encouraging wider adoption. Growing clinical research activities, regulatory approvals, and funding in oncology, along with increasing awareness of early cancer detection, further accelerate market expansion.

Technological advancements in tracers, including fluorescent agents, hybrid tracers, and targeted imaging compounds, are significantly improving the accuracy and real-time visualization of sentinel lymph nodes. These innovations improve detection rates and reduce reliance on traditional methods, driving greater adoption in minimally invasive

and image-guided surgeries. As a result, advanced tracers are becoming a key factor in improving surgical precision and expanding the market for SLNB imaging agents.

The rising global cancer incidence, particularly breast cancer and melanoma, is a major driver of the market, as these procedures are essential for accurate cancer staging and treatment planning. The growing patient population increases the demand for precise lymphatic mapping, thereby supporting the adoption of advanced imaging agents to improve diagnostic accuracy and surgical outcomes.

The growing preference for minimally invasive procedures is driving the adoption of sentinel lymph node biopsy as an effective alternative to extensive lymph node dissection. This shift is increasing demand for imaging agents that enable accurate lymphatic mapping while minimizing surgical complications and shortening recovery time. As clinicians increasingly focus on improving patient outcomes and procedural efficiency, the use of precise and user-friendly SLNB imaging agents continues to expand. For instance, in September 2025, King George's Medical University (KGMU) in Lucknow, India, performed an advanced minimally invasive gynecologic cancer surgery using an ICG-enabled laparoscopic immunofluorescence system, allowing real-time lymph node assessment. This approach enhances intraoperative visualization and delivers benefits to patients, including smaller incisions, reduced pain, faster recovery, and improved safety.

Global Sentinel Lymph Node Biopsy Imaging Agents Market Report Segmentation

This report forecasts revenue growth at global, regional, and country levels and provides an analysis on the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the global sentinel lymph node biopsy imaging agents market report based on product, application, procedure, end use, and region:

Product Outlook (Revenue, USD Million, 2021 - 2033)

Radioactive Tracers

Technetium-99m Sulfur Colloid

Technetium-99m Nanocolloid

Tilmanocept (Lymphoseek)

Others

Dye-Based Agents

Isosulfan Blue

Patent Blue V

Methylene Blue

Fluorescent Imaging Agents

Others

Application Outlook (Revenue, USD Million, 2021 - 2033)

Breast Cancer

Melanoma

Head & Neck Cancer

Gynecological Cancers

Other Indications

Procedure Outlook (Revenue, USD Million, 2021 - 2033)

Open Surgery

Minimally Invasive Surgery

End Use Outlook (Revenue, USD Million, 2021 - 2033)

Hospitals

Ambulatory Surgical Centers (ASCs)

Cancer Specialty Clinics

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

Germany

UK

France

Italy

Spain

Denmark

Sweden

Norway

Asia Pacific

Japan

China

India

South Korea

Australia

Thailand

Latin America

Brazil

Argentina

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Contents

CHAPTER 1. METHODOLOGY AND SCOPE

- 1.1. Market Segmentation & Scope
 - 1.1.1. Product
 - 1.1.2. Application
 - 1.1.3. Procedure
 - 1.1.4. End Use
 - 1.1.5. Regional scope
 - 1.1.6. Estimates and forecast timeline
- 1.2. Research Methodology
- 1.3. Information Procurement
 - 1.3.1. Purchased database
 - 1.3.2. GVR's internal database
 - 1.3.3. Secondary sources
 - 1.3.4. Primary research
 - 1.3.5. Details of primary research
- 1.4. Information or Data Analysis
 - 1.4.1. Data analysis models
- 1.5. Market Formulation & Validation
- 1.6. Model Details
 - 1.6.1. Commodity flow analysis (Model 1)
 - 1.6.1.1. Approach 1: Commodity flow approach
 - 1.6.2. Volume price analysis (Model 2)
 - 1.6.2.1. Approach 2: Volume price analysis
- 1.7. List of Secondary Sources
- 1.8. List of Primary Sources
- 1.9. Objectives
 - 1.9.1. Objective
 - 1.9.2. Objective

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. Market Outlook
- 2.2. Segment Outlook
- 2.3. Competitive Insights

CHAPTER 3. SENTINEL LYMPH NODE BIOPSY IMAGING AGENTS MARKET

Sentinel Lymph Node Biopsy Imaging Agents Market Size, Share & Trends Analysis Report By Product (Radioactive...

VARIABLES, TRENDS & SCOPE

3.1. Market Lineage Outlook

3.1.1. Parent market outlook

3.2. Market Dynamics

3.2.1. Market driver analysis

3.2.1.1. Rising global cancer incidence

3.2.1.2. Shift toward minimally invasive procedures

3.2.1.3. Technological advancements in tracers

3.2.2. Market restraint analysis

3.2.2.1. Skilled labor shortage

3.2.2.2. High capital & procedure costs

3.2.3. Market opportunity analysis

3.2.3.1. Expansion of non-radioactive alternatives

3.2.3.2. Integration of theranostics and hybrid agents

3.2.3.3. Expansion into new clinical applications

3.2.3.4. Increasing AI and robot-assisted surgery

3.2.3.5. Growing number of clinical trials

3.2.3.6. Growth in outpatient adoption

3.2.4. Market challenge analysis

3.2.4.1. Lack of standardization

3.2.4.2. Logistical & regulatory hurdles

3.2.4.3. Competition from alternative techniques

3.3. Sentinel Lymph Node Biopsy Imaging Agents Market Analysis Tools

3.3.1. Industry Analysis - Porter's

3.3.1.1. Bargaining power of suppliers

3.3.1.2. Bargaining power of buyers

3.3.1.3. Threat of substitutes

3.3.1.4. Threat of new entrants

3.3.1.5. Competitive rivalry

3.3.2. PESTEL Analysis

3.3.2.1. Political & Legal Landscape

3.3.2.2. Economic and Social Landscape

3.3.2.3. Technological landscape

CHAPTER 4. SENTINEL LYMPH NODE BIOPSY IMAGING AGENTS MARKET: PRODUCT ESTIMATES & TREND ANALYSIS

4.1. Segment Dashboard

4.2. Global Sentinel Lymph Node Biopsy Imaging Agents Market Product Movement Analysis

4.3. Global Sentinel Lymph Node Biopsy Imaging Agents Market Size & Trend Analysis, by Product 2021 to 2033 (USD Million)

4.4. Radioactive Tracers

4.4.1. Radioactive tracers market estimates and forecasts for 2021 to 2033 (USD Million)

4.4.1.1. Technetium-99m Sulfur Colloid

4.4.1.1.1. Technetium-99m sulfur colloid market estimates and forecasts for 2021 to 2033 (USD Million)

4.4.1.2. Technetium-99m nanocolloid

4.4.1.2.1. Technetium-99m nanocolloid market estimates and forecasts for 2021 to 2033 (USD Million)

4.4.1.3. Tilmanocept (Lymphoseek)

4.4.1.3.1. Tilmanocept (Lymphoseek) market estimates and forecasts for 2021 to 2033 (USD Million)

4.4.1.4. Others

4.4.1.4.1. Others market estimates and forecasts for 2021 to 2033 (USD Million)

4.5. Dye-Based Agents

4.5.1. Dye-based agents market estimates and forecasts for 2021 to 2033 (USD Million)

4.5.1.1. Isosulfan Blue

4.5.1.1.1. Isosulfan Blue market estimates and forecasts for 2021 to 2033 (USD Million)

4.5.1.2. Patent Blue V

4.5.1.2.1. Patent Blue V market estimates and forecasts for 2021 to 2033 (USD Million)

4.5.1.3. Methylene Blue

4.5.1.3.1. Methylene Blue market estimates and forecasts for 2021 to 2033 (USD Million)

CHAPTER 5. SENTINEL LYMPH NODE BIOPSY IMAGING AGENTS MARKET: APPLICATION ESTIMATES & TREND ANALYSIS

5.1. Segment Dashboard

5.2. Global Sentinel Lymph Node Biopsy Imaging Agents Market Application Movement Analysis

5.3. Global Sentinel Lymph Node Biopsy Imaging Agents Market Size & Trend Analysis, by Application, 2021 to 2033 (USD Million)

5.4. Breast Cancer

5.4.1. Breast cancer market estimates and forecast 2021 to 2033 (USD Million)

5.5. Melanoma

5.5.1. Melanoma market estimates and forecast 2021 to 2033 (USD Million)

5.6. Head & Neck Cancer

5.6.1. Head & neck cancer market estimates and forecast 2021 to 2033 (USD Million)

5.7. Gynecological Cancers

5.7.1. Gynecological cancers market estimates and forecast 2021 to 2033 (USD Million)

5.8. Other Indications

5.8.1. Other indications market estimates and forecasts for 2021 to 2033 (USD Million)

CHAPTER 6. SENTINEL LYMPH NODE BIOPSY IMAGING AGENTS MARKET: PROCEDURE ESTIMATES & TREND ANALYSIS

6.1. Segment Dashboard

6.2. Global Sentinel Lymph Node Biopsy Imaging Agents Market Procedure Movement Analysis

6.3. Global Sentinel Lymph Node Biopsy Imaging Agents Market Size & Trend Analysis, by Procedure, 2021 to 2033 (USD Million)

6.4. Open Surgery

6.4.1. Open surgery market estimates and forecast 2021 to 2033 (USD Million)

6.5. Minimally Invasive Surgery

6.5.1. Minimally invasive surgery market estimates and forecast 2021 to 2033 (USD Million)

CHAPTER 7. SENTINEL LYMPH NODE BIOPSY IMAGING AGENTS MARKET: END USE ESTIMATES & TREND ANALYSIS

7.1. Segment Dashboard

7.2. Global Sentinel Lymph Node Biopsy Imaging Agents Market End Use Movement Analysis

7.3. Global Sentinel Lymph Node Biopsy Imaging Agents Market Size & Trend Analysis, by End Use, 2021 to 2033 (USD Million)

7.4. Hospitals

7.4.1. Hospitals market estimates and forecast 2021 to 2033 (USD Million)

7.5. Sinus Lift

7.5.1. Sinus lift market estimates and forecast 2021 to 2033 (USD Million)

7.6. Ambulatory Surgical Centers

7.6.1. Ambulatory surgical centers market estimates and forecast 2021 to 2033 (USD Million)

7.7. Cancer Specialty Clinics

7.7.1. Cancer specialty clinics market estimates and forecast 2021 to 2033 (USD Million)

CHAPTER 8. SENTINEL LYMPH NODE BIOPSY IMAGING AGENTS MARKET: REGIONAL ESTIMATES & TREND ANALYSIS BY PRODUCT, BY PROCEDURE, BY END USE AND BY APPLICATION

8.1. Regional Dashboard

8.2. Market Size & Forecasts and Trend Analysis, 2021 to 2033

8.3. North America

8.3.1. Market estimates and forecast, 2021 - 2033 (Revenue, USD Million)

8.3.2. U.S.

8.3.2.1. Key country dynamics

8.3.2.2. Competitive scenario

8.3.2.3. Regulatory framework

8.3.2.4. Reimbursement scenario

8.3.2.5. U.S. market estimates and forecasts, 2021 - 2033

8.3.3. Canada

8.3.3.1. Key country dynamics

8.3.3.2. Competitive scenario

8.3.3.3. Regulatory framework

8.3.3.4. Reimbursement scenario

8.3.3.5. Canada market estimates and forecasts, 2021 - 2033

8.3.4. Mexico

8.3.4.1. Key country dynamics

8.3.4.2. Competitive scenario

8.3.4.3. Regulatory framework

8.3.4.4. Reimbursement scenario

8.3.4.5. Mexico market estimates and forecasts, 2021 - 2033

8.4. Europe

8.4.1. UK

8.4.1.1. Key country dynamics

8.4.1.2. Competitive scenario

8.4.1.3. Regulatory framework

8.4.1.4. Reimbursement scenario

8.4.1.5. UK market estimates and forecasts, 2021 - 2033

8.4.2. Germany

8.4.2.1. Key country dynamics

8.4.2.2. Competitive scenario

8.4.2.3. Regulatory framework

8.4.2.4. Reimbursement scenario

8.4.2.5. Germany market estimates and forecasts, 2021 - 2033

8.4.3. France

8.4.3.1. Key country dynamics

8.4.3.2. Competitive scenario

8.4.3.3. Regulatory framework

8.4.3.4. Reimbursement scenario

8.4.3.5. France market estimates and forecasts, 2021 - 2033

8.4.4. Italy

8.4.4.1. Key country dynamics

8.4.4.2. Competitive scenario

8.4.4.3. Regulatory framework

8.4.4.4. Reimbursement scenario

8.4.4.5. Italy market estimates and forecasts, 2021 - 2033

8.4.5. Spain

8.4.5.1. Key country dynamics

8.4.5.2. Competitive scenario

8.4.5.3. Regulatory framework

8.4.5.4. Reimbursement scenario

8.4.5.5. Spain market estimates and forecasts, 2021 - 2033

8.4.6. Denmark

8.4.6.1. Key country dynamics

8.4.6.2. Competitive scenario

8.4.6.3. Regulatory framework

8.4.6.4. Reimbursement scenario

8.4.6.5. Denmark market estimates and forecasts, 2021 - 2033

8.4.7. Sweden

8.4.7.1. Key country dynamics

8.4.7.2. Competitive scenario

8.4.7.3. Regulatory framework

8.4.7.4. Reimbursement scenario

8.4.7.5. Sweden market estimates and forecasts, 2021 - 2033

8.4.8. Norway

8.4.8.1. Key country dynamics

8.4.8.2. Competitive scenario

- 8.4.8.3. Regulatory framework
- 8.4.8.4. Reimbursement scenario
- 8.4.8.5. Norway market estimates and forecasts, 2021 - 2033

8.5. Asia Pacific

8.5.1. Japan

- 8.5.1.1. Key country dynamics
- 8.5.1.2. Competitive scenario
- 8.5.1.3. Regulatory framework
- 8.5.1.4. Reimbursement scenario
- 8.5.1.5. Japan market estimates and forecasts, 2021 - 2033

8.5.2. India

- 8.5.2.1. Key country dynamics
- 8.5.2.2. Competitive scenario
- 8.5.2.3. Regulatory framework
- 8.5.2.4. Reimbursement scenario
- 8.5.2.5. India market estimates and forecasts, 2021 - 2033

8.5.3. China

- 8.5.3.1. Key country dynamics
- 8.5.3.2. Competitive scenario
- 8.5.3.3. Regulatory framework
- 8.5.3.4. Reimbursement scenario
- 8.5.3.5. China market estimates and forecasts, 2021 - 2033

8.5.4. South Korea

- 8.5.4.1. Key country dynamics
- 8.5.4.2. Competitive scenario
- 8.5.4.3. Regulatory framework
- 8.5.4.4. Reimbursement scenario
- 8.5.4.5. South Korea market estimates and forecasts, 2021 - 2033

8.5.5. Australia

- 8.5.5.1. Key country dynamics
- 8.5.5.2. Competitive scenario
- 8.5.5.3. Regulatory framework
- 8.5.5.4. Reimbursement scenario
- 8.5.5.5. Australia market estimates and forecasts, 2021 - 2033

8.5.6. Thailand

- 8.5.6.1. Key country dynamics
- 8.5.6.2. Competitive scenario
- 8.5.6.3. Regulatory framework
- 8.5.6.4. Reimbursement scenario

8.5.6.5. Thailand market estimates and forecasts, 2021 - 2033

8.6. Latin America

8.6.1. Brazil

8.6.1.1. Key country dynamics

8.6.1.2. Competitive scenario

8.6.1.3. Regulatory framework

8.6.1.4. Reimbursement scenario

8.6.1.5. Brazil market estimates and forecasts, 2021 - 2033

8.6.2. Argentina

8.6.2.1. Key country dynamics

8.6.2.2. Competitive scenario

8.6.2.3. Regulatory framework

8.6.2.4. Reimbursement scenario

8.6.2.5. Argentina market estimates and forecasts, 2021 - 2033

8.7. MEA

8.7.1. South Africa

8.7.1.1. Key country dynamics

8.7.1.2. Competitive scenario

8.7.1.3. Regulatory framework

8.7.1.4. Reimbursement scenario

8.7.1.5. South Africa market estimates and forecasts, 2021 - 2033

8.7.2. Saudi Arabia

8.7.2.1. Key country dynamics

8.7.2.2. Competitive scenario

8.7.2.3. Regulatory framework

8.7.2.4. Reimbursement scenario

8.7.2.5. Saudi Arabia market estimates and forecasts, 2021 - 2033

8.7.3. UAE

8.7.3.1. Key country dynamics

8.7.3.2. Competitive scenario

8.7.3.3. Regulatory framework

8.7.3.4. Reimbursement scenario

8.7.3.5. UAE market estimates and forecasts, 2021 - 2033

8.7.4. Kuwait

8.7.4.1. Key country dynamics

8.7.4.2. Competitive scenario

8.7.4.3. Regulatory framework

8.7.4.4. Reimbursement scenario

8.7.4.5. Kuwait market estimates and forecasts, 2021 - 2033

CHAPTER 9. COMPETITIVE LANDSCAPE

9.1. Recent Developments & Impact Analysis, By Key Market Participants

9.2. Company/Competition Categorization

9.2.1. Innovators

9.3. Vendor Landscape

9.3.1. List of key distributors and channel partners

9.3.2. Key customers

9.3.3. Global Key company market share analysis, 2025

9.3.4. Cardinal Health

9.3.4.1. Company overview

9.3.4.2. Financial performance

9.3.4.3. Product benchmarking

9.3.4.4. Strategic initiatives

9.3.5. Curium Pharma

9.3.5.1. Company overview

9.3.5.2. Financial performance

9.3.5.3. Product benchmarking

9.3.5.4. Strategic initiatives

9.3.6. Jubilant Pharmova

9.3.6.1. Company overview

9.3.6.2. Financial performance

9.3.6.3. Product benchmarking

9.3.6.4. Strategic initiatives

9.3.7. Guerbet

9.3.7.1. Company overview

9.3.7.2. Financial performance

9.3.7.3. Product benchmarking

9.3.7.4. Strategic initiatives

9.3.8. Diagnostic Green

9.3.8.1. Company overview

9.3.8.2. Financial performance

9.3.8.3. Product benchmarking

9.3.8.4. Strategic initiatives

9.3.9. Sun Pharmaceutical Industries, Inc.

9.3.9.1. Company overview

9.3.9.2. Financial performance

9.3.9.3. Product benchmarking

- 9.3.9.4. Strategic initiatives
- 9.3.10. GE HealthCare
 - 9.3.10.1. Company overview
 - 9.3.10.2. Financial performance
 - 9.3.10.3. Product benchmarking
 - 9.3.10.4. Strategic initiatives
- 9.3.11. VIATRIS (Mylan Inc.)
 - 9.3.11.1. Company overview
 - 9.3.11.2. Financial performance
 - 9.3.11.3. Product benchmarking
 - 9.3.11.4. Strategic initiatives
- 9.3.12. Macsen Labs
 - 9.3.12.1. Company overview
 - 9.3.12.2. Financial performance
 - 9.3.12.3. Product benchmarking
 - 9.3.12.4. Strategic initiatives
- 9.3.13. POLATOM
 - 9.3.13.1. Company overview
 - 9.3.13.2. Financial performance
 - 9.3.13.3. Product benchmarking
 - 9.3.13.4. Strategic initiatives
- 9.3.14. Hologic Inc.
 - 9.3.14.1. Company overview
 - 9.3.14.2. Financial performance
 - 9.3.14.3. Product benchmarking
 - 9.3.14.4. Strategic initiatives
- 9.4. Heat Map Analysis/ Company Market Position Analysis
- 9.5. Estimated Company Market Share Analysis, 2025
- 9.6. List of Other Key Market Players

List Of Tables

LIST OF TABLES

Table 1. List of secondary sources

Table 2. List of abbreviation

Table 3. North America sentinel lymph node biopsy imaging agents market, by country, 2021 - 2033 (USD Million)

Table 4. North America sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 5. North America sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 6. North America sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 7. North America sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 8. U.S. sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 9. U.S. sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 10. U.S. sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 11. U.S. sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 12. Canada sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 13. Canada sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 14. Canada sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 15. Canada sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 16. Mexico sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 17. Mexico sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 18. Mexico sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 19. Mexico sentinel lymph node biopsy imaging agents market, by end use, 2021

- 2033 (USD Million)

Table 20. Europe sentinel lymph node biopsy imaging agents market, by country, 2021 - 2033 (USD Million)

Table 21. Europe sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 22. Europe sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 23. Europe sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 24. Europe sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 25. UK sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 26. UK sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 27. UK sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 28. UK sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 29. Germany sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 30. Germany sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 31. Germany sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 32. Germany sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 33. France sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 34. France sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 35. France sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 36. France sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 37. Italy sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 38. Italy sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 39. Italy sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 40. Italy sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 41. Spain sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 42. Spain sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 43. Spain sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 44. Spain sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 45. Denmark sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 46. Denmark sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 47. Denmark sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 48. Denmark sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 49. Sweden sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 50. Sweden sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 51. Sweden sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 52. Sweden sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 53. Norway sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 54. Norway sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 55. Norway sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 56. Norway sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 57. Asia Pacific sentinel lymph node biopsy imaging agents market, by country, 2021 - 2033 (USD Million)

Table 58. Asia Pacific sentinel lymph node biopsy imaging agents market, by product,

2021 - 2033 (USD Million)

Table 59. Asia Pacific sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 60. Asia Pacific sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 61. Asia Pacific sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 62. China sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 63. China sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 64. China sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 65. China sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 66. Japan sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 67. Japan sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 68. Japan sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 69. Japan sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 70. India sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 71. India sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 72. India sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 73. India sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 74. South Korea sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 75. South Korea sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 76. South Korea sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 77. South Korea sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 78. Australia sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 79. Australia sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 80. Australia sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 81. Australia sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 82. Thailand sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 83. Thailand sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 84. Thailand sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 85. Thailand sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 86. Latin America sentinel lymph node biopsy imaging agents market, by country, 2021 - 2033 (USD Million)

Table 87. Latin America sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 88. Latin America sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 89. Latin America sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 90. Latin America sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 91. Brazil sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 92. Brazil sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 93. Brazil sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 94. Brazil sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 95. Argentina sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 96. Argentina sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 97. Argentina sentinel lymph node biopsy imaging agents market, by procedure,

2021 - 2033 (USD Million)

Table 98. Argentina sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 99. Middle East & Africa sentinel lymph node biopsy imaging agents market, by country, 2021 - 2033 (USD Million)

Table 100. Middle East & Africa sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 101. Middle East & Africa sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 102. Middle East & Africa sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 103. Middle East & Africa sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 104. South Africa sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 105. South Africa sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 106. South Africa sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 107. South Africa sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 108. Saudi Arabia sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 109. Saudi Arabia sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 110. Saudi Arabia sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 111. Saudi Arabia sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 112. UAE sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 113. UAE sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 114. UAE sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 115. UAE sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

Table 116. Kuwait sentinel lymph node biopsy imaging agents market, by product, 2021 - 2033 (USD Million)

Table 117. Kuwait sentinel lymph node biopsy imaging agents market, by application, 2021 - 2033 (USD Million)

Table 118. Kuwait sentinel lymph node biopsy imaging agents market, by procedure, 2021 - 2033 (USD Million)

Table 119. Kuwait sentinel lymph node biopsy imaging agents market, by end use, 2021 - 2033 (USD Million)

List Of Figures

LIST OF FIGURES

- Fig. 1 Information Procurement
- Fig. 2 Primary Research Pattern
- Fig. 3 Market Research Approaches
- Fig. 4 Value Chain-Based Sizing & Forecasting
- Fig. 5 Market Formulation & Validation
- Fig. 6 Sentinel Lymph Node Biopsy Imaging Agents Market, Market Segmentation
- Fig. 7 Market Driver Analysis (Current & Future Impact)
- Fig. 8 Market Restraint Analysis (Current & Future Impact)
- Fig. 9 Market Opportunity Analysis (Current & Future Impact)
- Fig. 10 Market Challenge Analysis (Current & Future Impact)
- Fig. 11 SWOT Analysis, By Factor (Political & Legal, Economic, and Technological)
- Fig. 12 Porter's Five Forces Analysis
- Fig. 13 Regional Marketplace: Key Takeaways
- Fig. 14 Sentinel Lymph Node Biopsy Imaging Agents Market: Product movement analysis
- Fig. 15 Radioactive Tracers Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 16 Technetium-99m Sulfur Colloid Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 17 Technetium-99m Nanocolloid Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 18 Tilmanocept (Lymphotoseek) Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 19 Others Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 20 Isosulfan Blue Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 21 Patent Blue V Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 22 Methylene Blue Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 23 Fluorescent Imaging Agents Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 24 Others Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 25 Sentinel Lymph Node Biopsy Imaging Agents Market: Application Movement Analysis
- Fig. 26 Breast Cancer Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 27 Melanoma Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 28 Head & Neck Cancer Market Estimates and Forecast, 2021 - 2033 (USD Million)
- Fig. 29 Gynecological Cancers Market Estimates and Forecast, 2021 - 2033 (USD

Million)

Fig. 30 Other Indications Market Estimates and Forecast, 2021 - 2033 (USD Million)

Fig. 31 Sentinel Lymph Node Biopsy Imaging Agents Market: Procedure Movement Analysis

Fig. 32 Open Surgery Market Estimates and Forecast, 2021 - 2033 (USD Million)

Fig. 33 Minimally Invasive Surgery Market Estimates and Forecast, 2021 - 2033 (USD Million)

Fig. 34 Sentinel Lymph Node Biopsy Imaging Agents Market: Application Movement Analysis

Fig. 35 Hospitals Market Estimates and Forecast, 2021 - 2033 (USD Million)

Fig. 36 Ambulatory Surgical Centers (ASCs) Market Estimates and Forecast, 2021 - 2033 (USD Million)

Fig. 37 Cancer Specialty Clinics Market Estimates and Forecast, 2021 - 2033 (USD Million)

Fig. 38 Regional Outlook, 2025 & 2033

Fig. 39 North America Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 40 U.S. Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 41 Canada Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 42 Mexico Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 43 Europe Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 44 Germany Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 45 UK Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 46 France Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 47 Italy Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 48 Spain Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 49 Denmark Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 50 Sweden Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD Million)

Fig. 51 Norway Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033
(USD Million)

Fig. 52 Asia Pacific Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033
(USD Million)

Fig. 53 Japan Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD
Million)

Fig. 54 China Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD
Million)

Fig. 55 India Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD
Million)

Fig. 56 Australia Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033
(USD Million)

Fig. 57 South Korea Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033
(USD Million)

Fig. 58 Thailand Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033
(USD Million)

Fig. 59 Latin America Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 -
2033 (USD Million)

Fig. 60 Brazil Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD
Million)

Fig. 61 Argentina Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033
(USD Million)

Fig. 62 Middle East and Africa Sentinel Lymph Node Biopsy Imaging Agents Market,
2021 - 2033 (USD Million)

Fig. 63 South Africa Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033
(USD Million)

Fig. 64 Saudi Arabia Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033
(USD Million)

Fig. 65 UAE Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD
Million)

Fig. 66 Kuwait Sentinel Lymph Node Biopsy Imaging Agents Market, 2021 - 2033 (USD
Million)

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