

# **Interventional Oncology Market by Devices & Consumables (RF, microwave, cryoablation. embolization), Procedures (Thermal Ablation, Non-Thermal Ablation, TACE, TARE, TAE), Cancer (Liver, Lung), End User (Hospital, Specialty Clinic) - Global Forecast to 2029**

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## **Abstracts**

The interventional oncology market is projected to reach USD 4.24 billion by 2029 from USD 2.75 billion in 2024, at a CAGR of 9.0% during the forecast period. Interventional oncology, has seen significant growth over the past decade. Progress in minimally invasive techniques and an increase in cancer prevalence rates have contributed significantly to this boom. Initially, the market for interventional oncology was underdeveloped owing to the long-standing use of traditional surgical approaches for cancer; however, growing evidence of safety and efficacy from interventional treatments like TACE, TARE, and thermal ablation sparked interest in using these treatments. These techniques have many advantages, such as shorter recovery times, fewer complications, and better overall patient outcomes compared to conventional surgery. The increasing demand for effective treatments for inoperable tumors, especially liver, lung, and kidney cancers, has driven the growth of the market.

“By devices & consumables, embolization devices segment is expected to have the largest market share in the interventional oncology market.”

Based on devices & consumables, the market share of embolization devices in the interventional oncology sector is highest, as these are crucial tools in minimally invasive cancer treatments that provide an overwhelming advantage over conventional surgical methods. These devices act by reducing or cutting off the blood flow to the tumor, thus

starving the tumor of the oxygen and nutrients needed for growth. The growing trend of embolization procedures, TACE, and radioembolization, which is also called selective internal radiation therapy, can be attributed to their proven success in the treatment of inoperable cancers, especially liver cancer, which remains a significant concern in interventional oncology. Improvements in embolic agents, including drug-eluting beads and radioactive microspheres, have improved accuracy and therapeutic outcomes and are therefore becoming more popular. Such factors as the increased global incidence of cancer, increased awareness of non-invasive treatment options, and shift towards outpatient care models further contribute to the growing use of such devices.

“By cancer type, liver cancer segment is expected to have the largest market share in the interventional oncology market.”

Based on cancer type, liver cancer is the biggest market share in the interventional oncology segment, primarily due to its increasing global incidence, high mortality rate, and the urgent need for effective, minimally invasive treatment solutions. Hepatocellular carcinoma, the most common form of liver cancer, is closely associated with risk factors such as chronic hepatitis B and C infections, excessive alcohol use, and the growing prevalence of non-alcoholic fatty liver disease. Targeted treatments such as TACE, TARE, and percutaneous ablation in interventional oncology have been very effective in the treatment of unresectable liver cancers. These interventions provide localized tumor control, reduced systemic toxicity, and improved survival outcomes compared to traditional chemotherapy.

“By procedure, transcatheter arterial radioembolization (TARE) or selective internal radiation therapy (SIRT) segment is expected to have the largest market share in the interventional oncology market.”

Based on procedure, transcatheter arterial radioembolization (TARE), also referred to as selective internal radiation therapy (SIRT), holds the largest market share in the interventional oncology sector due to its demonstrated efficacy in managing both primary and secondary liver cancers, which account for a significant portion of cancer-related mortalities worldwide. This procedure involves injecting microspheres that are infused with radioactive isotopes, most commonly Yttrium-90, directly into the hepatic artery that feeds the tumor. TARE is effective in killing tumor cells with minimal systemic exposure and reduced damage to healthy surrounding tissues by delivering localized radiation. It is becoming increasingly popular because of a superior safety profile, enhanced tolerability, and fewer adverse effects than conventional chemotherapy and

external beam radiation therapy. In addition, TARE is particularly useful in patients with unresectable hepatocellular carcinoma and liver metastases from colorectal cancer, in whom alternative treatments are less effective or unavailable.

“By end user, hospitals segment is expected to have the largest market share in the interventional oncology market.”

Based on end user, transcatheter arterial radioembolization (TARE), also referred to as selective internal radiation therapy (SIRT), holds the largest market share in the interventional oncology sector due to its demonstrated efficacy in managing both primary and secondary liver cancers, which account for a significant portion of cancer-related mortalities worldwide. This procedure involves injecting microspheres that are infused with radioactive isotopes, most commonly Yttrium-90, directly into the hepatic artery that feeds the tumor. TARE is effective in killing tumor cells with minimal systemic exposure and reduced damage to healthy surrounding tissues by delivering localized radiation. It is becoming increasingly popular because of a superior safety profile, enhanced tolerability, and fewer adverse effects than conventional chemotherapy and external beam radiation therapy. In addition, TARE is particularly useful in patients with unresectable hepatocellular carcinoma and liver metastases from colorectal cancer, in whom alternative treatments are less effective or unavailable.

“By region, North America region is expected to have the largest market share in the interventional oncology market.”

The market share of interventional oncology is dominated by hospitals because of their wide infrastructure, latest technology, and multidisciplinary expertise necessary to perform advanced interventional procedures. Techniques such as TACE, TARE, and tumor ablation are highly specialized and minimally invasive and require access to sophisticated imaging systems, catheterization laboratories, and experienced interventional radiologists. Tertiary care centers and dedicated cancer hospitals have more of such facilities, so these are ideally placed as the first option for interventional oncology treatment. Additionally, a hospital would offer complete treatment; it offers diagnosis, treatment, post-treatment care, and follow-up. This helps in attracting the wide patient spectrum looking for one-stop solutions to treat cancer.

A breakdown of the primary participants (supply-side) for the interventional oncology market referred to for this report is provided below:

By Company Type: Tier 1–35%, Tier 2–40%, and Tier 3–25%

By Designation: C-level–20%, Director Level–35%, and Others–45%

By Region: North America–27%, Europe–25%, Asia Pacific–30%, Latin America–8%, Middle East & Africa–10% .

Prominent players in the interventional oncology market are Siemens Healthineers AG (Varian) (US), Medtronic (Ireland), Boston Scientific Corporation (US), Terumo Corporation (Japan), Merit Medical Systems (US), Johnson & Johnson MedTech (Ethicon) (US), Stryker (US), Teleflex Incorporated (US), AngioDynamics (US), Cook (US), Icecure Medical (Israel), Olympus Corporation (Japan), Imbiotechnologies Ltd (Canada), Medwaves Inc (US), Minimax Medical Limited (China), ABK Biomedical Inc (Canada), RF Medical Co., Ltd (South Korea), Profound Medical (Canada), Surgnova (China), STARmed America (US), Sirtex SIR-Spheres Pty Ltd (US), Accuray Incorporated (US), Guerbet (France), Embolx, Inc (Canada) and Sonablate Corp (US).

#### Research Coverage:

The report analyzes the interventional oncology market and aims at estimating the market size and future growth potential of this market based on various segments such as devices & consumables, cancer type, procedure, end user and region. The report also includes a competitive analysis of the key players in this market along with their company profiles, service offerings, recent developments, and key market strategies.

#### Reasons to Buy the Report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall interventional oncology market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

This report provides insights into the following pointers:

Analysis of key drivers (Rising patient preference for minimally invasive procedure, expansion of cancer patient population, increasing public-private

funding and government support for interventional oncology, technological advancements in interventional oncology), restraints (High cost of interventional oncology, unfavorable regulations), opportunities (emerging economies offer high growth potential), challenges (dearth of well-trained and skilled radiologist and oncologist, strong market positioning of alternative therapies)

**ZMarket Penetration:** It includes extensive information on products offered by the major players in the global the interventional oncology market. The report includes various segments in offering, application, end user and region.

**Product Enhancement/Innovation:** Comprehensive details about new product launches and anticipated trends in the global interventional oncology market.

**Market Development:** Thorough knowledge and analysis of the profitable rising markets by offering, application, end user and region.

**Market Diversification:** Comprehensive information about newly launched products, expanding markets, current advancements, and investments in the global the interventional oncology market.

**Competitive Assessment:** Thorough evaluation of the market shares, growth plans, offerings of products, and capacities of the major competitors in the global interventional oncology market.

## Contents

### 1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION & SCOPE
  - 1.2.1 INCLUSIONS & EXCLUSIONS
  - 1.2.2 MARKETS COVERED
  - 1.2.3 YEARS CONSIDERED
  - 1.2.4 CURRENCY CONSIDERED
- 1.3 STAKEHOLDERS
- 1.4 LIMITATIONS
- 1.5 SUMMARY OF CHANGES

### 2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
  - 2.1.1 SECONDARY DATA
    - 2.1.1.1 Key data from secondary sources
  - 2.1.2 PRIMARY DATA
    - 2.1.2.1 Key data from primary sources
    - 2.1.2.2 Key industry insights
- 2.2 MARKET SIZE ESTIMATION
- 2.3 MARKET BREAKDOWN AND DATA TRIANGULATION
- 2.4 MARKET SHARE ESTIMATION
- 2.5 STUDY ASSUMPTIONS
- 2.6 RESEARCH LIMITATIONS
  - 2.6.1 METHODOLOGY-RELATED LIMITATIONS
- 2.7 RISK ASSESSMENT

### 3 EXECUTIVE SUMMARY

### 4 PREMIUM INSIGHTS

- 4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN INTERVENTIONAL ONCOLOGY MARKET
- 4.2 ASIA PACIFIC: INTERVENTIONAL ONCOLOGY MARKET, BY DEVICES & CONSUMABLES AND COUNTRY, 2023
- 4.3 INTERVENTIONAL ONCOLOGY MARKET: GEOGRAPHIC GROWTH

## OPPORTUNITIES

### 4.4 INTERVENTIONAL ONCOLOGY MARKET, BY REGION, 2024?2029

### 4.5 INTERVENTIONAL ONCOLOGY MARKET: DEVELOPED VS. EMERGING MARKETS

## 5 MARKET OVERVIEW

### 5.1 INTRODUCTION

### 5.2 MARKET DYNAMICS

#### 5.2.1 DRIVERS

5.2.1.1 Rising preference for minimally invasive procedures

5.2.1.2 Growing prevalence of cancer

5.2.1.3 Increasing public-private funding and government support for interventional oncology

5.2.1.4 Technological advancements in interventional oncology

#### 5.2.2 RESTRAINTS

5.2.2.1 High cost of interventional oncology

5.2.2.2 Unfavorable regulations

#### 5.2.3 OPPORTUNITIES

5.2.3.1 Emerging economies offer high-growth potential

#### 5.2.4 CHALLENGES

5.2.4.1 Dearth of well-trained and skilled radiologists and oncologists

5.2.4.2 Strong market position of alternative therapies

### 5.3 INDUSTRY TRENDS

5.3.1 INNOVATIONS IN IMAGING AND TREATMENT TECHNOLOGIES

5.3.2 INCREASING ADOPTION OF MINIMALLY INVASIVE PROCEDURES

### 5.4 VALUE CHAIN ANALYSIS

### 5.5 TECHNOLOGY ANALYSIS

#### 5.5.1 KEY TECHNOLOGIES

5.5.1.1 Ablation technologies

5.5.1.2 Embolization technologies

#### 5.5.2 COMPLEMENTARY TECHNOLOGY

5.5.2.1 Laparoscopy

5.5.2.2 Diagnostic imaging

#### 5.5.3 ADJACENT TECHNOLOGY

5.5.3.1 Radiation therapy systems

5.5.3.2 Chemotherapy

### 5.6 PORTER'S FIVE FORCES ANALYSIS

#### 5.6.1 THREAT OF NEW ENTRANTS



- 5.6.2 THREAT OF SUBSTITUTES
- 5.6.3 BARGAINING POWER OF SUPPLIERS
- 5.6.4 BARGAINING POWER OF BUYERS
- 5.6.5 INTENSITY OF COMPETITIVE RIVALRY
- 5.7 KEY STAKEHOLDERS AND BUYING CRITERIA
  - 5.7.1 KEY STAKEHOLDERS IN BUYING PROCESS
  - 5.7.2 BUYING CRITERIA
- 5.8 REGULATORY LANDSCAPE
  - 5.8.1 KEY REGULATORY BODIES AND GOVERNMENT AGENCIES
  - 5.8.2 KEY REGULATORY GUIDELINES
    - 5.8.2.1 US
    - 5.8.2.2 Canada
    - 5.8.2.3 Europe
    - 5.8.2.4 Asia Pacific
      - 5.8.2.4.1 Japan
      - 5.8.2.4.2 China
      - 5.8.2.4.3 India
    - 5.8.2.5 Brazil
- 5.9 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES
- 5.10 PATENT ANALYSIS
  - 5.10.1 PATENT PUBLICATION TRENDS FOR INTERVENTIONAL ONCOLOGY, JANUARY 2014–DECEMBER 2024
- 5.11 TRADE ANALYSIS
- 5.12 PRICING ANALYSIS
  - 5.12.1 AVERAGE SELLING PRICE OF INTERVENTIONAL ONCOLOGY DEVICES, BY KEY PLAYER, 2023
  - 5.12.2 AVERAGE SELLING PRICE OF INTERVENTIONAL ONCOLOGY DEVICES, BY KEY PLAYER, 2023 (USD)
  - 5.12.3 AVERAGE SELLING PRICE TREND OF INTERVENTIONAL ONCOLOGY DEVICES, BY REGION, 2021–2023
- 5.13 KEY CONFERENCES AND EVENTS, 2025–2026
- 5.14 UNMET NEEDS AND END USER EXPECTATIONS
  - 5.14.1 UNMET NEEDS
- 5.15 END USER EXPECTATIONS IN INTERVENTIONAL ONCOLOGY MARKET
- 5.16 ECOSYSTEM
- 5.17 CASE STUDIES
- 5.18 SUPPLY CHAIN ANALYSIS
- 5.19 ADJACENT MARKET ANALYSIS
- 5.20 INTERVENTIONAL ONCOLOGY MARKET, INVESTMENT AND FUNDING



SCENARIO,

**2020–2023**

5.21 IMPACT OF GENERATIVE AI ON INTERVENTIONAL ONCOLOGY MARKET

## **6 INTERVENTIONAL ONCOLOGY MARKET, BY DEVICES & CONSUMABLES**

### **6.1 INTRODUCTION**

### **6.2 EMBOLIZATION DEVICES**

#### **6.2.1 RADIOEMBOLIC AGENTS**

6.2.1.1 Precision-targeted therapy for challenging liver cancers to boost market

#### **6.2.2 NON-RADIOACTIVE EMBOLIC AGENTS**

6.2.2.1 Non-radiation emitting agents to propel market

#### **6.2.2.2 Microspheres**

6.2.2.2.1 Surge in prevalence of hepatocellular carcinoma to fuel growth

#### **6.2.2.3 Coated beads**

6.2.2.3.1 Specialized polymer coatings with enhanced ability to bind, absorb, and release chemotherapeutic agents to drive market

#### **6.2.2.4 Microparticles**

6.2.2.4.1 Use in various cancer applications to drive growth

### **6.3 ABLATION DEVICES**

#### **6.3.1 RADIOFREQUENCY (RF) ABLATION DEVICES**

6.3.1.1 Effective treatment of small or difficult-to-reach tumors to propel market growth

#### **6.3.2 MICROWAVE ABLATION DEVICES**

6.3.2.1 Simultaneous treatment of multiple lesions to drive market growth

#### **6.3.3 CRYOABLATION DEVICES**

6.3.3.1 Least painful and higher patient compatibility to drive market

#### **6.3.4 OTHER ABLATION DEVICES**

### **6.4 SUPPORT DEVICES**

#### **6.4.1 MICROCATHETERS**

6.4.1.1 Precise delivery of therapeutic agents to tumors to boost market

#### **6.4.2 GUIDEWIRES**

6.4.2.1 Advancements in guidewire construction and launch of new and advanced products to propel market

#### **6.4.3 OTHER SUPPORT DEVICES**

## **7 INTERVENTIONAL ONCOLOGY MARKET, BY CANCER TYPE**

## 7.1 INTRODUCTION

## 7.2 LIVER CANCER

7.2.1 INCREASING DISEASE PREVALENCE AND RISING RESEARCH ACTIVITIES TO DRIVE MARKET GROWTH

## 7.3 KIDNEY CANCER

7.3.1 FIRST-LINE THERAPY PRESERVING MORE KIDNEY TISSUE THAN SURGERY TO BOOST MARKET

## 7.4 BREAST CANCER

7.4.1 HIGH PRECISION, BETTER COSMETIC OUTCOMES, COST-EFFECTIVENESS, AND GREATER PATIENT COMFORT TO PROPEL MARKET

## 7.5 LUNG CANCER

7.5.1 INCREASING NUMBER OF CANCER CASES TO DRIVE DEMAND

## 7.6 BONE CANCER

7.6.1 DIRECT ELIMINATION OF TUMORS AND PAIN RELIEF TO FUEL MARKET

## 7.7 PROSTATE CANCER

7.7.1 RISING INCIDENCE OF PROSTATE CANCER AND GROWING ADOPTION OF METAL-BASED FIDUCIAL MARKERS TO CONTRIBUTE TO MARKET GROWTH

## 7.8 OTHER CANCER TYPES

# 8 INTERVENTIONAL ONCOLOGY MARKET, BY PROCEDURE

## 8.1 INTRODUCTION

## 8.2 TRANSCATHETER ARTERIAL RADIOEMBOLIZATION/SELECTIVE INTERNAL RADIATION THERAPY (TARE/SIRT)

8.2.1 GREATER CLINICAL EFFICACY TO DRIVE MARKET GROWTH

## 8.3 TRANSCATHETER ARTERIAL CHEMOEMBOLIZATION (TACE)

8.3.1 ABILITY TO TREAT SMALL AND LARGE-SIZED TUMORS TO DRIVE DEMAND

## 8.4 TRANSCATHETER ARTERIAL EMBOLIZATION/BLAND EMBOLIZATION (TAE)

8.4.1 INCREASING CLINICAL EVIDENCE IN FAVOR OF TARE AND TACE TO RESTRAIN MARKET GROWTH

## 8.5 THERMAL TUMOR ABLATION

8.5.1 GROWING CLINICAL EVIDENCE PROVING EFFICACY OF TREATMENT OF VARIOUS TYPES OF CANCERS TO DRIVE MARKET GROWTH

## 8.6 NON-THERMAL TUMOR ABLATION

8.6.1 POTENTIAL ALTERNATIVE TO THERMAL TUMOR ABLATION TO BOOST MARKET

## **9 INTERVENTIONAL ONCOLOGY MARKET, BY END USER**

### **9.1 INTRODUCTION**

### **9.2 HOSPITALS**

9.2.1 INCREASING NUMBER OF SURGERIES IN IN-PATIENT SETTINGS TO SUPPORT MARKET GROWTH

### **9.3 SPECIALTY CLINICS**

9.3.1 INCREASING NUMBER OF CANCER CENTERS TO DRIVE MARKET GROWTH

### **9.4 RESEARCH & ACADEMIC INSTITUTES**

9.4.1 COLLABORATIONS AMONG DEVICE MANUFACTURERS AND SUPPLIERS TO FUEL MARKET

## **10 INTERVENTIONAL ONCOLOGY MARKET, BY REGION**

### **10.1 INTRODUCTION**

### **10.2 NORTH AMERICA**

10.2.1 MACROECONOMIC OUTLOOK FOR NORTH AMERICA

#### **10.2.2 US**

10.2.2.1 Rising cancer cases and preference for ablation procedures to boost market

#### **10.2.3 CANADA**

10.2.3.1 Significant rise in cancer cases to drive market growth

### **10.3 EUROPE**

10.3.1 MACROECONOMIC OUTLOOK FOR EUROPE

#### **10.3.2 GERMANY**

10.3.2.1 Increase in incidence of cancer and rising geriatric population to fuel market

#### **10.3.3 UK**

10.3.3.1 Increasing awareness and support for cancer-related activities to drive market

#### **10.3.4 FRANCE**

10.3.4.1 Growing geriatric population to support market growth

#### **10.3.5 SPAIN**

10.3.5.1 Increasing government funding for research to support market growth

#### **10.3.6 ITALY**

10.3.6.1 Growing awareness about cancer and treatment options to support market growth

#### **10.3.7 REST OF EUROPE**

### **10.4 ASIA PACIFIC**

10.4.1 MACROECONOMIC OUTLOOK FOR ASIA PACIFIC

#### 10.4.2 JAPAN

10.4.2.1 Rising geriatric population and universal healthcare reimbursement to drive market

#### 10.4.3 CHINA

10.4.3.1 Increasing incidence of cancer to drive market

#### 10.4.4 INDIA

10.4.4.1 Improving research capabilities and expansion of key players to drive market growth

#### 10.4.5 AUSTRALIA

10.4.5.1 Rising investments in research and awareness campaigns to support market growth

#### 10.4.6 SOUTH KOREA

10.4.6.1 Rising R&D and promising clinical trials to positively impact market growth

#### 10.4.7 REST OF ASIA PACIFIC

### 10.5 LATIN AMERICA

#### 10.5.1 MACROECONOMIC OUTLOOK FOR LATIN AMERICA

#### 10.5.2 BRAZIL

10.5.2.1 Rising incidence of cancer and improving healthcare infrastructure to fuel market

#### 10.5.3 MEXICO

10.5.3.1 Increasing awareness campaigns and rising incidence of cancer to drive market growth

#### 10.5.4 REST OF LATIN AMERICA

### 10.6 MIDDLE EAST & AFRICA

#### 10.6.1 MACROECONOMIC OUTLOOK

#### 10.6.2 GCC COUNTRIES

10.6.2.1 Broader healthcare modernization initiatives in interventional oncology to drive market

#### 10.6.3 REST OF MIDDLE EAST & AFRICA

## 11 COMPETITIVE LANDSCAPE

### 11.1 OVERVIEW

### 11.2 KEY PLAYER STRATEGIES/RIGHT TO WIN, 2021–2024

### 11.3 REVENUE ANALYSIS, 2019?2023

### 11.4 MARKET SHARE ANALYSIS, 2023

### 11.5 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

#### 11.5.1 STARS

#### 11.5.2 EMERGING LEADERS

### 11.5.3 PERVASIVE PLAYERS

### 11.5.4 PARTICIPANTS

### 11.5.5 COMPANY FOOTPRINT: KEY PLAYERS, 2023

#### 11.5.5.1 Company footprint

#### 11.5.5.2 Region footprint

#### 11.5.5.3 Devices & Consumables footprint

#### 11.5.5.4 Cancer type footprint

#### 11.5.5.5 Procedure footprint

#### 11.5.5.6 End user footprint

### 11.6 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023

#### 11.6.1 PROGRESSIVE COMPANIES

#### 11.6.2 DYNAMIC COMPANIES

#### 11.6.3 STARTING BLOCKS

#### 11.6.4 RESPONSIVE COMPANIES

### 11.6.5 COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES, 2023

#### 11.6.5.1 Detailed list of key startups/SMES, 2023

#### 11.6.5.2 Competitive benchmarking of key startups/SMEs

### 11.7 VALUATION & FINANCIAL METRICS

#### 11.7.1 FINANCIAL METRICS

#### 11.7.2 COMPANY VALUATION

### 11.8 BRAND COMPARISON

### 11.9 COMPETITIVE SCENARIO

#### 11.9.1 PRODUCT & SERVICE LAUNCHES AND APPROVALS

#### 11.9.2 DEALS

#### 11.9.3 EXPANSIONS

## 12 COMPANY PROFILES

### 12.1 KEY PLAYERS

#### 12.1.1 SIEMENS HEALTHINEERS AG (VARIAN MEDICAL SYSTEMS, INC)

##### 12.1.1.1 Business overview

##### 12.1.1.2 Products/Solutions/Services offered

##### 12.1.1.3 Recent developments

###### 12.1.1.3.1 Product launches & approvals

###### 12.1.1.3.2 Deals

##### 12.1.1.4 MnM view

###### 12.1.1.4.1 Right to win

###### 12.1.1.4.2 Strategic choices

###### 12.1.1.4.3 Weaknesses and competitive threats

## 12.1.2 BOSTON SCIENTIFIC CORPORATION

### 12.1.2.1 Business overview

### 12.1.2.2 Products/Solutions/Services offered

### 12.1.2.3 Recent developments

#### 12.1.2.3.1 Product launches & approvals

#### 12.1.2.3.2 Deals

### 12.1.2.4 MnM view

#### 12.1.2.4.1 Right to win

#### 12.1.2.4.2 Strategic choices

#### 12.1.2.4.3 Weaknesses and competitive threats

## 12.1.3 MEDTRONIC

### 12.1.3.1 Business overview

### 12.1.3.2 Products/Solutions/Services offered

### 12.1.3.3 MnM view

#### 12.1.3.3.1 Right to win

#### 12.1.3.3.2 Strategic choices

#### 12.1.3.3.3 Weaknesses and competitive threats

## 12.1.4 TERUMO CORPORATION

### 12.1.4.1 Business overview

### 12.1.4.2 Products/Solutions/Services offered

### 12.1.4.3 Recent developments

#### 12.1.4.3.1 Expansions

### 12.1.4.4 MnM view

#### 12.1.4.4.1 Right to win

#### 12.1.4.4.2 Strategic choices

#### 12.1.4.4.3 Weaknesses and competitive threats

## 12.1.5 MERIT MEDICAL SYSTEMS

### 12.1.5.1 Business overview

### 12.1.5.2 Products/Solutions/Services offered

### 12.1.5.3 Recent developments

#### 12.1.5.3.1 Expansions

### 12.1.5.4 MnM view

#### 12.1.5.4.1 Right to win

#### 12.1.5.4.2 Strategic choices

#### 12.1.5.4.3 Weaknesses and competitive threats

## 12.1.6 JOHNSON & JOHNSON MEDTECH (ETHICON)

### 12.1.6.1 Business overview

### 12.1.6.2 Products/Solutions/Services offered

## 12.1.7 TELEFLEX INCORPORATED

- 12.1.7.1 Business overview
- 12.1.7.2 Products/Solutions/Services offered
- 12.1.8 ANGIODYNAMICS
  - 12.1.8.1 Business overview
  - 12.1.8.2 Products/Solutions/Services offered
  - 12.1.8.3 Recent developments
    - 12.1.8.3.1 Product launches & approvals
- 12.1.9 STRYKER
  - 12.1.9.1 Business overview
  - 12.1.9.2 Products/Solutions/Services offered
- 12.1.10 IMBIOTECHNOLOGIES LTD.
  - 12.1.10.1 Business overview
  - 12.1.10.2 Products/Solutions/Services offered
- 12.1.11 COOK
  - 12.1.11.1 Business overview
  - 12.1.11.2 Products/Solutions/Services offered
- 12.1.12 ICECURE MEDICAL
  - 12.1.12.1 Business overview
  - 12.1.12.2 Products/Solutions/Services offered
  - 12.1.12.3 Recent developments
    - 12.1.12.3.1 Product approvals
    - 12.1.12.3.2 Deals
- 12.1.13 MEDWAVES, INC.
  - 12.1.13.1 Business overview
  - 12.1.13.2 Products/Solutions/Services offered
- 12.1.14 PROFOUND MEDICAL
  - 12.1.14.1 Business overview
  - 12.1.14.2 Products/Solutions/Services offered
- 12.1.15 RF MEDICAL CO., LTD.
  - 12.1.15.1 Business overview
  - 12.1.15.2 Products/Solutions/Services offered
- 12.1.16 MINIMAX MEDICAL LIMITED
  - 12.1.16.1 Business overview
  - 12.1.16.2 Products/Solutions/Services offered
- 12.1.17 ABK BIOMEDICAL INC.
  - 12.1.17.1 Business overview
  - 12.1.17.2 Products/Solutions/Services offered
- 12.1.18 OLYMPUS CORPORATION
  - 12.1.18.1 Business overview



12.1.18.2 Products/Solutions/Services offered

12.1.19 SURGNOVA

12.1.19.1 Business overview

12.1.19.2 Products/Solutions/Services offered

12.1.20 STARMED AMERICA

12.1.20.1 Business overview

12.1.20.2 Products/Solutions/Services offered

12.2 OTHER PLAYERS

12.2.1 SIRTEX SIR-SPHERES PTY LTD.

12.2.2 GUERBET

12.2.3 ACCURAY INCORPORATED

12.2.4 EMBOLX, INC.

12.2.5 SONABLATE CORP.

## **13 APPENDIX**

13.1 DISCUSSION GUIDE

13.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

13.3 CUSTOMIZATION OPTIONS

13.4 RELATED REPORTS

13.5 AUTHOR DETAILS

## I would like to order

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