

Interventional Oncology Market by Product (Radiofrequency, microwave, embolization, guidewires), Procedure (Thermal, Non-Thermal Ablation, TACE, TARE, TAE), Cancer (Liver, Lung, Kidney, Bone Metastasis), Enduser (Hospital, ASC) - Global Forecast to 2026

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Abstracts

The global interventional oncology market size is projected to reach USD 2.9 billion by 2026 from USD 1.9 billion in 2020, at a CAGR of 6.8%. Factors such as the technological advancements in the market are propelling the growth of the interventional oncology market. Additionally, rising cases of surgeries, investments from both private and public sectors are having affect in the growth of interventional oncology market. However, unfavorable reimbursement scenarios in some countries is hampering the growth of this market.

The recent COVID-19 global pandemic has also impacted the interventional oncology market. Demand from the main end-users has declined as key regions and countries have imposed social distancing rules and lockdowns. This impact is expected to be short-term, and no adverse effects are to be foreseen after the market gradually reopens.

“The embolization devices segment to witness the highest share in interventional oncology market, by product, during the forecast period.”

In 2020, embolization devices accounted for a share of the interventional oncology market. Embolization devices include non-radioactive embolic agents and radioembolic agents. Although these devices are primarily employed to treat hepatocellular

carcinoma, their use has been widely extended to various other forms of cancer. These devices are used when tumors cannot be treated using ablation techniques and in cases where the tumor size is large. They are also used in palliative procedures and as a pre-operative procedure to improve the outcome of liver resection.

Embolic agents include radioembolic agents and non-radioactive embolic agents. Non-radioactive embolic agents include gelatin foam, tris-acryl gelatin microspheres, and polyvinyl alcohol (PVA). Gelatin foam is a non-radioactive embolic agent and is considered a temporary embolic agent whose effect is relatively shorter. Other non-radioactive embolic agents are considered permanent agents whose effects are seen for a longer period.

“The liver cancer accounted for the largest share of the interventional oncology market, by application, in 2020.”

Liver cancer accounted for the largest share of the interventional oncology market in 2020. Interventional oncology plays a crucial role in treating liver cancer, as removing the tumor with surgery may not leave the tissue healthy enough for effective liver functioning. Thus, primary liver tumors or liver tumors resulting from metastatic cancers can effectively be treated using interventional oncology procedures. Owing to this, more than half of all treatments for primary and metastatic liver cancer are conducted using interventional oncology.

The large share of this segment can be attributed to factors such as rising cases of liver cancer across the globe and growing initiatives/research activities to develop advanced liver cancer therapies using interventional oncology. In addition, initiatives in the form of grants and funding for the development of advanced therapies using interventional oncology also fuel market growth.

“The Hospitals & diagnostic centers segment accounted for the largest share of the interventional oncology market, by end users, in 2020”

Hospitals & diagnostic centers accounted for the largest share of the interventional oncology market in 2020. The availability of state-of-the-art facilities for treating disorders and injuries and trained personnel has ensured a steady demand for hospital-based care. The inflow of patients is considerably higher in hospitals than in other healthcare settings, which is another key driver for market growth.

Hospitals routinely conduct a wide range of surgical procedures, and most of these

surgeries are performed in hospital in-patient settings. Growth in this segment is primarily attributed to the growing number of minimally invasive surgeries and electrosurgery procedures performed in hospitals and the adoption of robotic surgery.

“The Asia Pacific market to grow at the highest CAGR during the forecast period.”

The interventional oncology market is segmented into five major regions, namely, North America, Europe, Asia Pacific, Latin America, and Middle East & Africa. Government efforts to increased funding , supportive regulations for the development and commercialization of advanced interventional oncology products, rising healthcare expenditure, increasing number of hospitals and clinics in India and China, expanding research base across India, China, and Japan, and the increasing incidence of surgeries are the major factors driving the growth of the APAC interventional oncology market.

Breakdown of supply-side primary interviews:

By Company Type: Tier 1: 48%, Tier 2: 36%, and Tier 3: 16%

By Designation: C-level: 10%, D-level: 14%, and Others: 76%

By Region: North America: 45%, Europe: 24%, APAC: 20%, Latin America: 7%, and the Middle East & Africa: 4%

The major players operating in the interventional oncology market are Medtronic (Ireland), Boston Scientific (US), BD (US), Terumo (Japan), Merit Medical (US), AngioDynamics (US), J&J (US), Teleflex (US), Cook Medical (US), HealthTronics (US), MedWaves (US), Sanarus (US), IMBiotechnologies (Canada), Trod Medical (US), IceCure Medical (Israel), Mermaid Medicals (Denmark), Interface Biomaterials BV (Netherlands), Guerbet (France), ABK Biomedical (Canada), Shape Memory Medical (US), Endo Shape (US), Monteris Medical (US), Instylla (US), Trisalus Lifesciences (US), Profound Medical Corp (Canada), Sirtex (US), Accuray (US), Baylis Medical (Canada), and ALPINION MEDICAL SYSTEMS (South Korea).

Research Coverage

This report studies the interventional oncology market based on the product, procedure, cancer type, end user, and region. The report also studies factors (such as drivers,

restraints, opportunities, and challenges) affecting market growth and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micromarkets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to five major regions (and the respective countries in these regions).

Key Benefits of Buying the Report

This report focuses on various levels of analysis—industry trends, market share of top players, and company profiles, which together form basic views and analyze the competitive landscape, emerging segments of the interventional oncology market, and high-growth regions and their drivers, restraints, opportunities, and challenges. The report will help both established firms as well as new entrants/smaller firms to gauge the pulse of the market and garner greater market shares.

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