

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.

Contents

1 INTRODUCTION

- 1.1 OBJECTIVES OF THE STUDY
- 1.2 MARKET DEFINITION
- 1.3 MARKET SCOPE
 - 1.3.1 MARKETS COVERED
 - 1.3.2 GEOGRAPHIC SCOPE
 - 1.3.3 YEARS CONSIDERED FOR THE STUDY
- 1.4 CURRENCY
- 1.5 STAKEHOLDERS
- 1.6 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - FIGURE 1 INTERVENTIONAL ONCOLOGY MARKET: RESEARCH METHODOLOGY STEPS
 - FIGURE 2 RESEARCH DESIGN
 - 2.1.1 SECONDARY DATA
 - 2.1.1.1 Key data from secondary sources
 - 2.1.2 PRIMARY DATA
 - FIGURE 3 BREAKDOWN OF PRIMARIES: GLOBAL INTERVENTIONAL ONCOLOGY MARKET
 - FIGURE 4 RESEARCH METHODOLOGY: HYPOTHESIS BUILDING
- 2.2 MARKET SIZE ESTIMATION
 - 2.2.1 PRODUCT-BASED MARKET ESTIMATION
 - FIGURE 5 INTERVENTIONAL ONCOLOGY MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH
 - FIGURE 6 INTERVENTIONAL ONCOLOGY MARKET SIZE ESTIMATION: TOP-DOWN APPROACH
 - 2.2.2 PRIMARY RESEARCH VALIDATION
- 2.3 MARKET BREAKDOWN AND DATA TRIANGULATION
 - FIGURE 7 DATA TRIANGULATION METHODOLOGY
- 2.4 RESEARCH LIMITATIONS

3 EXECUTIVE SUMMARY

FIGURE 8 INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2020 VS. 2026 (USD MILLION)

FIGURE 9 INTERVENTIONAL ONCOLOGY MARKET SHARE, BY PROCEDURE, 2020

FIGURE 10 INTERVENTIONAL ONCOLOGY MARKET, BY CANCER TYPE, 2020 VS. 2026 (USD MILLION)

FIGURE 11 INTERVENTIONAL ONCOLOGY MARKET, BY END USER, 2020 VS. 2026 (USD MILLION)

FIGURE 12 GEOGRAPHICAL SNAPSHOT OF THE INTERVENTIONAL ONCOLOGY MARKET

4 PREMIUM INSIGHTS

4.1 INTERVENTIONAL ONCOLOGY MARKET OVERVIEW

FIGURE 13 RISING PREFERENCE FOR MINIMALLY INVASIVE PROCEDURES IS DRIVING THE GROWTH OF THE INTERVENTIONAL ONCOLOGY MARKET

4.2 INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT

FIGURE 14 EMBOLIZATION DEVICES TO ACCOUNT FOR THE LARGEST SHARE OF THE MARKET DURING THE FORECAST PERIOD

4.3 ASIA PACIFIC: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT (2020)

FIGURE 15 EMBOLIZATION DEVICES ACCOUNTED FOR THE LARGEST SHARE OF THE ASIA PACIFIC MARKET IN 2020

4.4 EUROPE: INTERVENTIONAL ONCOLOGY MARKET, BY CANCER TYPE (2020)

FIGURE 16 LIVER CANCER COMMANDED THE LARGEST SHARE OF THE EUROPEAN INTERVENTIONAL ONCOLOGY MARKET IN 2020

4.5 INTERVENTIONAL ONCOLOGY MARKET, BY END USER, 2020 VS. 2026 (USD MILLION)

FIGURE 17 HOSPITALS TO REGISTER THE HIGHEST GROWTH IN THE FORECAST PERIOD

4.6 GEOGRAPHICAL SNAPSHOT OF THE INTERVENTIONAL ONCOLOGY MARKET

FIGURE 18 ASIA PACIFIC TO REGISTER THE HIGHEST CAGR IN THE INTERVENTIONAL ONCOLOGY MARKET DURING THE FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 19 INTERVENTIONAL ONCOLOGY MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Rising patient preference for minimally invasive procedures

5.2.1.2 Expansion of the target patient population

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 Dearth of well-trained and skilled radiologists and oncologists

5.2.2.2 Unfavorable regulations

5.2.3 OPPORTUNITIES

5.2.3.1 Emerging economies offer high growth potential

5.2.3.2 Rising awareness about the benefits of interventional oncology

5.2.4 CHALLENGES

5.2.4.1 Limited clinical data to support therapeutic efficacy

5.2.4.2 Strong market positioning of alternative therapies

5.3 MARKET TRENDS

5.3.1 PERSONALIZED OR PRECISION INTERVENTIONAL ONCOLOGY

5.4 REGULATORY SCENARIO

5.4.1 US

5.4.1.1 Japan

TABLE 1 JAPAN: MEDICAL DEVICE CLASSIFICATION UNDER PMDA

5.5 ECOSYSTEM COVERAGE

5.6 VALUE CHAIN ANALYSIS

5.7 PRICING ANALYSIS

6 INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT

6.1 INTRODUCTION

TABLE 2 INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

6.2 EMBOLIZATION DEVICES

TABLE 3 RECENT PRODUCT LAUNCHES AND APPROVALS OF EMBOLIZATION DEVICES

TABLE 4 INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 5 INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY REGION, 2019–2026 (USD MILLION)

6.2.1 INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET SPLIT, BY PROCEDURE

TABLE 6 INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

6.2.2 INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET SPLIT, BY CANCER TYPE

TABLE 7 INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)

6.2.3 RADIOEMBOLIC AGENTS

6.2.3.1 Radioembolic agents dominated the interventional oncology embolization devices market

TABLE 8 RADIOEMBOLIC AGENTS OFFERED BY MAJOR MARKET PLAYERS

TABLE 9 RADIOEMBOLIC AGENTS MARKET, BY REGION, 2019–2026 (USD MILLION)

6.2.3.1.1 Radioembolic agents market split, by procedure

TABLE 10 RADIOEMBOLIC AGENTS MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

6.2.3.1.2 Radioembolic agents market split, by cancer type

TABLE 11 RADIOEMBOLIC AGENTS MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)

6.2.4 NON-RADIOACTIVE EMBOLIC AGENTS

6.2.4.1 Embolization procedures cannot be used to treat cancers in advanced stages, which is a major factor restraining market growth

TABLE 12 NON-RADIOACTIVE EMBOLIC AGENTS OFFERED BY MAJOR MARKET PLAYERS

TABLE 13 NON-RADIOACTIVE EMBOLIC AGENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 14 NON-RADIOACTIVE EMBOLIC AGENTS MARKET, BY REGION, 2019–2026 (USD MILLION)

6.2.4.1.1 Non-radioactive embolic agents market split, by procedure

TABLE 15 NON-RADIOACTIVE EMBOLIC AGENTS MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

6.2.4.1.2 Non-radioactive embolic agents market split, by cancer type

TABLE 16 NON-RADIOACTIVE EMBOLIC AGENTS MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)

6.2.4.2 Microspheres

6.2.4.2.1 Preference for alternative procedures limits the growth of this market segment

TABLE 17 INTERVENTIONAL ONCOLOGY MARKET FOR MICROSPHERES, BY REGION, 2019–2026 (USD MILLION)

6.2.4.3 Coated beads

6.2.4.3.1 Coated beads are better at finding CTC cancer, driving the growth of this market segment

TABLE 18 INTERVENTIONAL ONCOLOGY MARKET FOR COATED BEADS, BY REGION, 2019–2026 (USD MILLION)

6.2.4.4 Microparticles

6.2.4.4.1 Microparticles can be used in various cancer applications—a key factor driving growth

TABLE 19 MAJOR BRANDS OF MICROCARRIERS

TABLE 20 INTERVENTIONAL ONCOLOGY MARKET FOR MICROPARTICLES, BY REGION, 2019–2026 (USD MILLION)

6.3 ABLATION DEVICES

TABLE 21 INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 22 INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY REGION, 2019–2026 (USD MILLION)

6.3.1 INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET SPLIT, BY PROCEDURE

TABLE 23 INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

6.3.2 INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET SPLIT, BY CANCER TYPE

TABLE 24 INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)

6.3.3 RADIOFREQUENCY (RF) ABLATION DEVICES

6.3.3.1 Growing competition among different technologies offered by key players, backed by long-term clinical efficacy data, to drive the RF ablation devices market

TABLE 25 RADIOFREQUENCY ABLATION DEVICES OFFERED BY MAJOR MARKET PLAYERS

TABLE 26 RADIOFREQUENCY ABLATION DEVICES MARKET, BY REGION, 2019–2026 (USD MILLION)

6.3.3.1.1 Radiofrequency ablation devices market split, by procedure

TABLE 27 RADIOFREQUENCY ABLATION DEVICES MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

6.3.3.1.2 Radiofrequency ablation devices market split, by cancer type

TABLE 28 RADIOFREQUENCY ABLATION DEVICES MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)

6.3.4 MICROWAVE ABLATION DEVICES

6.3.4.1 Microwave ablation enables the simultaneous treatment of multiple lesions—a key factor driving market growth

**TABLE 29 MICROWAVE ABLATION DEVICES MARKET, BY REGION, 2019–2026
(USD MILLION)**

6.3.4.1.1 Microwave ablation devices market split, by procedure

**TABLE 30 MICROWAVE ABLATION DEVICES MARKET, BY PROCEDURE,
2019–2026 (USD MILLION)**

6.3.4.1.2 Microwave ablation devices market split, by cancer type

**TABLE 31 MICROWAVE ABLATION DEVICES MARKET, BY CANCER TYPE,
2019–2026 (USD MILLION)****6.3.5 CRYOABLATION DEVICES**

6.3.5.1 Advantages of cryoablation over other thermal ablation techniques to drive market growth in the coming years

**TABLE 32 CRYOABLATION DEVICES MARKET, BY REGION, 2019–2026 (USD
MILLION)**

6.3.5.1.1 Cryoablation devices market split, by procedure

**TABLE 33 CRYOABLATION DEVICES MARKET, BY PROCEDURE, 2019–2026 (USD
MILLION)**

6.3.5.1.2 Cryoablation devices market split, by cancer type

**TABLE 34 CRYOABLATION DEVICES MARKET, BY CANCER TYPE, 2019–2026
(USD MILLION)****6.3.6 OTHER ABLATION DEVICES****TABLE 35 OTHER ABLATION DEVICES MARKET, BY REGION, 2019–2026 (USD
MILLION)**

6.3.6.1 Other ablation devices market split, by procedure

**TABLE 36 OTHER ABLATION DEVICES MARKET, BY PROCEDURE, 2019–2026
(USD MILLION)**

6.3.6.2 Other ablation devices market split, by cancer type

**TABLE 37 OTHER ABLATION DEVICES MARKET, BY CANCER TYPE, 2019–2026
(USD MILLION)****6.4 SUPPORT DEVICES****TABLE 38 INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE,
2019–2026 (USD MILLION)****TABLE 39 INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY
REGION, 2019–2026 (USD MILLION)****6.4.1 INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET SPLIT, BY
PROCEDURE****TABLE 40 INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY
PROCEDURE, 2019–2026 (USD MILLION)****6.4.2 INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET SPLIT, BY
CANCER TYPE**

TABLE 41 INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)**6.4.3 MICROCATHETERS**

6.4.3.1 Regulatory approvals driving the growth of the microcatheters market

TABLE 42 MICROCATHETERS MARKET, BY REGION, 2019–2026 (USD MILLION)**6.4.4 GUIDEWIRES**

6.4.4.1 Advancements in guidewire construction and the launch of new and advanced products are the major factors driving the growth of this market

TABLE 43 GUIDEWIRES MARKET, BY REGION, 2019–2026 (USD MILLION)**7 INTERVENTIONAL ONCOLOGY MARKET, BY CANCER TYPE****7.1 INTRODUCTION****TABLE 44 INTERVENTIONAL ONCOLOGY MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)****7.1.1 LIVER CANCER**

7.1.1.1 Increasing disease prevalence and rising research activities are driving market growth

TABLE 45 INTERVENTIONAL ONCOLOGY MARKET FOR LIVER CANCER, BY REGION, 2019–2026 (USD MILLION)**7.1.2 KIDNEY CANCER**

7.1.2.1 For patients with small lesions, cryoablation is considered a first-line therapy as it preserves more kidney tissue than surgery

TABLE 46 INTERVENTIONAL ONCOLOGY MARKET FOR KIDNEY CANCER, BY REGION, 2019–2026 (USD MILLION)**7.1.3 BREAST CANCER**

7.1.3.1 Growing number of breast cancer cases across the globe is fueling the adoption of IORT

TABLE 47 INTERVENTIONAL ONCOLOGY MARKET FOR BREAST CANCER, BY REGION, 2019–2026 (USD MILLION)**7.1.4 LUNG CANCER**

7.1.4.1 Increasing number of cancer cases will drive the demand for interventional oncology procedures

TABLE 48 INTERVENTIONAL ONCOLOGY MARKET FOR LUNG CANCER, BY REGION, 2019–2026 (USD MILLION)**7.1.5 BONE CANCER**

7.1.5.1 Interventional oncology procedures can eliminate tumors directly and relieve pain

TABLE 49 INTERVENTIONAL ONCOLOGY MARKET FOR BONE CANCER, BY

REGION, 2019–2026 (USD MILLION)

7.1.6 PROSTATE CANCER

7.1.6.1 Technological advancements in radiology devices to fuel the adoption of interventional oncology for prostate cancer treatment

TABLE 50 INTERVENTIONAL ONCOLOGY MARKET FOR PROSTATE CANCER, BY REGION, 2019–2026 (USD MILLION)

7.1.7 OTHER CANCERS

TABLE 51 INTERVENTIONAL ONCOLOGY MARKET FOR OTHER CANCERS, BY REGION, 2019–2026 (USD MILLION)

8 INTERVENTIONAL ONCOLOGY MARKET, BY PROCEDURE

8.1 INTRODUCTION

TABLE 52 INTERVENTIONAL ONCOLOGY MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

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

8.2.1 TARE SHOWS GREATER CLINICAL EFFICACY THAN TACE—A KEY FACTOR DRIVING MARKET GROWTH

TABLE 53 TRANSCATHETER ARTERIAL RADIOEMBOLIZATION/SELECTIVE INTERNAL RADIATION THERAPY PROCEDURES MARKET, BY REGION, 2019–2026 (USD MILLION)

8.3 TRANSCATHETER ARTERIAL CHEMOEMBOLIZATION (TACE)

8.3.1 ABILITY TO TREAT SMALL AND LARGE-SIZED TUMORS—A MAJOR FACTOR DRIVING THE DEMAND FOR TACE PROCEDURES

TABLE 54 TRANSCATHETER ARTERIAL CHEMOEMBOLIZATION PROCEDURES MARKET, BY REGION, 2019–2026 (USD MILLION)

8.4 THERMAL TUMOR ABLATION

8.4.1 GROWING CLINICAL EVIDENCE PROVING THE EFFICACY OF THERMAL TUMOR ABLATION IN THE TREATMENT OF VARIOUS TYPES OF CANCERS TO DRIVE MARKET GROWTH

TABLE 55 THERMAL TUMOR ABLATION PROCEDURES MARKET, BY REGION, 2019–2026 (USD MILLION)

8.5 TRANSCATHETER ARTERIAL EMBOLIZATION/BLAND EMBOLIZATION (TAE)

8.5.1 INCREASING CLINICAL EVIDENCE FOR TARE AND TACE TO RESTRAIN THE GROWTH OF THIS MARKET

TABLE 56 TRANSCATHETER ARTERIAL EMBOLIZATION/BLAND EMBOLIZATION PROCEDURES MARKET, BY REGION, 2019–2026 (USD MILLION)

8.6 NON-THERMAL TUMOR ABLATION

8.6.1 NANOKNIFE HAS EMERGED AS A POTENTIAL ALTERNATIVE TO THERMAL TUMOR ABLATION TECHNIQUES

TABLE 57 NON-THERMAL TUMOR ABLATION PROCEDURES MARKET, BY REGION, 2019–2026 (USD MILLION)

9 INTERVENTIONAL ONCOLOGY MARKET, BY END USER

9.1 INTRODUCTION

TABLE 58 INTERVENTIONAL ONCOLOGY MARKET, BY END USER, 2019–2026 (USD MILLION)

9.2 HOSPITALS

9.2.1 HIGH PURCHASING POWER AND INCREASING NUMBER OF SURGERIES IN HOSPITALS TO SUPPORT THE GROWTH OF THIS SEGMENT

TABLE 59 INTERVENTIONAL ONCOLOGY MARKET FOR HOSPITALS, BY REGION, 2019–2026 (USD MILLION)

9.3 AMBULATORY SURGERY CENTERS

9.3.1 INCREASING NUMBER OF AMBULATORY SURGERY CENTERS TO DRIVE MARKET GROWTH

TABLE 60 INTERVENTIONAL ONCOLOGY MARKET FOR AMBULATORY SURGERY CENTERS, BY REGION, 2019–2026 (USD MILLION)

9.4 RESEARCH & ACADEMIC INSTITUTES

9.4.1 BUDGETARY RESTRICTIONS IN RESEARCH & ACADEMIC INSTITUTES ARE LIMITING THE ADOPTION OF HIGH-END INTERVENTIONAL ONCOLOGY PRODUCTS

TABLE 61 INTERVENTIONAL ONCOLOGY MARKET FOR RESEARCH & ACADEMIC INSTITUTES, BY REGION, 2019–2026 (USD MILLION)

10 INTERVENTIONAL ONCOLOGY MARKET, BY REGION

10.1 INTRODUCTION

TABLE 62 INTERVENTIONAL ONCOLOGY MARKET, BY REGION, 2019–2026 (USD MILLION)

10.2 NORTH AMERICA

FIGURE 20 NORTH AMERICA: INTERVENTIONAL ONCOLOGY MARKET SNAPSHOT

TABLE 63 NORTH AMERICA: INTERVENTIONAL ONCOLOGY MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 64 NORTH AMERICA: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 65 NORTH AMERICA: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 66 NORTH AMERICA: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 67 NORTH AMERICA: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 68 NORTH AMERICA: INTERVENTIONAL ONCOLOGY MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

TABLE 69 NORTH AMERICA: INTERVENTIONAL ONCOLOGY MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)

10.2.1 US

10.2.1.1 US to dominate the North American interventional oncology market

TABLE 70 US: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 71 US: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 72 US: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 73 US: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.2.2 CANADA

10.2.2.1 Public-private initiatives to support the adoption of interventional oncology procedures in Canada

TABLE 74 CANADA: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 75 CANADA: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 76 CANADA: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 77 CANADA: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.3 EUROPE

TABLE 78 EUROPE: INTERVENTIONAL ONCOLOGY MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 79 EUROPE: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 80 EUROPE: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 81 EUROPE: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES

MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 82 EUROPE: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 83 EUROPE: INTERVENTIONAL ONCOLOGY MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

TABLE 84 EUROPE: INTERVENTIONAL ONCOLOGY MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)

10.3.1 GERMANY

10.3.1.1 Germany is the fastest-growing market in Europe

TABLE 85 GERMANY: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 86 GERMANY: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 87 GERMANY: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 88 GERMANY: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.3.2 UK

10.3.2.1 Increasing awareness and support for cancer-related activities to drive market growth in the UK

TABLE 89 UK: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 90 UK: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 91 UK: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 92 UK: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.3.3 FRANCE

10.3.3.1 Radiofrequency ablation dominated the ablation devices market in France

TABLE 93 FRANCE: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 94 FRANCE: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 95 FRANCE: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 96 FRANCE: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.3.4 ITALY

10.3.4.1 Growing awareness about cancer and treatment options to support market growth in Italy

TABLE 97 ITALY: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 98 ITALY: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 99 ITALY: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 100 ITALY: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.3.5 SPAIN

10.3.5.1 Growing geriatric population is a major factor driving market growth

TABLE 101 SPAIN: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 102 SPAIN: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 103 SPAIN: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 104 SPAIN: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.3.6 REST OF EUROPE

TABLE 105 ROE: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 106 ROE: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 107 ROE: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 108 ROE: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.4 ASIA PACIFIC

FIGURE 21 ASIA PACIFIC: INTERVENTIONAL ONCOLOGY MARKET SNAPSHOT

TABLE 109 ASIA PACIFIC: INTERVENTIONAL ONCOLOGY MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 110 ASIA PACIFIC: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 111 ASIA PACIFIC: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 112 ASIA PACIFIC: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 113 ASIA PACIFIC: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 114 ASIA PACIFIC: INTERVENTIONAL ONCOLOGY MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

TABLE 115 ASIA PACIFIC: INTERVENTIONAL ONCOLOGY MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)

10.4.1 JAPAN

10.4.1.1 Rising geriatric population and universal healthcare reimbursement are the major driving factors

TABLE 116 JAPAN: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 117 JAPAN: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 118 JAPAN: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 119 JAPAN: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.4.2 CHINA

10.4.2.1 Increasing cancer incidence and growing patient population to drive market growth in China

TABLE 120 CHINA: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 121 CHINA: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 122 CHINA: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 123 CHINA: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.4.3 INDIA

10.4.3.1 Improving research capabilities coupled with the expansion of key players to drive market growth in India

TABLE 124 INDIA: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 125 INDIA: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 126 INDIA: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 127 INDIA: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.4.4 AUSTRALIA

10.4.4.1 Rising research investments and awareness campaigns are the key factors supporting market growth

TABLE 128 AUSTRALIA: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 129 AUSTRALIA: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 130 AUSTRALIA: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 131 AUSTRALIA: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.4.5 SOUTH KOREA

10.4.5.1 Rising R&D and promising clinical trials in the country to positively impact market growth

TABLE 132 SOUTH KOREA: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 133 SOUTH KOREA: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 134 SOUTH KOREA: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 135 SOUTH KOREA: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.4.6 REST OF ASIA PACIFIC

TABLE 136 ROAPAC: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 137 ROAPAC: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 138 ROAPAC: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 139 ROAPAC: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.5 LATIN AMERICA

TABLE 140 LATAM: INTERVENTIONAL ONCOLOGY MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 141 LATAM: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 142 LATAM: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 143 LATAM: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES

MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 144 LATAM: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 145 LATAM: INTERVENTIONAL ONCOLOGY MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

TABLE 146 LATAM: INTERVENTIONAL ONCOLOGY MARKET, BY CANCER TYPE, 2019–2026 (USD MILLION)

10.5.1 BRAZIL

10.5.1.1 Brazil to account for the largest share of the Latin American interventional oncology market

TABLE 147 BRAZIL: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 148 BRAZIL: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 149 BRAZIL: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 150 BRAZIL: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.5.2 MEXICO

10.5.2.1 Growing awareness campaigns and rising incidence of cancer to drive market growth in Mexico

TABLE 151 MEXICO: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 152 MEXICO: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 153 MEXICO: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 154 MEXICO: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.5.3 REST OF LATIN AMERICA

TABLE 155 ROLA: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 156 ROLA: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 157 ROLA: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 158 ROLA: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

10.6 MIDDLE EAST & AFRICA

10.6.1 IMPROVING HEALTHCARE INFRASTRUCTURE AND RISING INCIDENCE OF CANCER ARE DRIVING GROWTH IN THE MIDDLE EAST & AFRICA

TABLE 159 MEA: INTERVENTIONAL ONCOLOGY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 160 MEA: INTERVENTIONAL ONCOLOGY ABLATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 161 MEA: INTERVENTIONAL ONCOLOGY EMBOLIZATION DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 162 MEA: INTERVENTIONAL ONCOLOGY SUPPORT DEVICES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 163 MEA: INTERVENTIONAL ONCOLOGY MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW

FIGURE 22 KEY DEVELOPMENTS IN THE INTERVENTIONAL ONCOLOGY MARKET FROM 2017 TO 2019

11.2 GLOBAL MARKET SHARE ANALYSIS, 2020

TABLE 164 MEDICAL TAPES AND BANDAGES MARKET: DEGREE OF COMPETITION

FIGURE 23 BOSTON SCIENTIFIC HELD THE LEADING POSITION IN THE INTERVENTIONAL ONCOLOGY MARKET IN 2020

11.3 COMPETITIVE LEADERSHIP MAPPING

11.4 VENDOR INCLUSION CRITERIA

11.5 VENDOR DIVE

11.5.1 STARS

11.5.2 EMERGING LEADERS

11.5.3 PERVASIVE PLAYERS

11.5.4 PARTICIPANTS

FIGURE 24 INTERVENTIONAL ONCOLOGY MARKET (GLOBAL) COMPETITIVE LEADERSHIP MAPPING, 2020

11.6 COMPETITIVE LEADERSHIP MAPPING: EMERGING COMPANIES/SMES/START-UPS (2020)

11.6.1 PROGRESSIVE COMPANIES

11.6.2 STARTING BLOCKS

11.6.3 RESPONSIVE COMPANIES

11.6.4 DYNAMIC COMPANIES

FIGURE 25 INTERVENTIONAL ONCOLOGY MARKET: GLOBAL COMPETITIVE

LEADERSHIP MAPPING, 2020 (SME/START-UPS)
11.7 COMPANY PRODUCT FOOTPRINT ANALYSIS
TABLE 165 PRODUCT FOOTPRINT OF COMPANIES
TABLE 166 INDUSTRY FOOTPRINT OF COMPANIES
TABLE 167 APPLICATION FOOTPRINT OF COMPANIES
TABLE 168 REGIONAL FOOTPRINT OF COMPANIES
11.8 COMPETITIVE SCENARIO (2017–2020)
11.8.1 KEY PRODUCT LAUNCHES
11.8.2 DEALS

12 COMPANY PROFILES

12.1 KEY PLAYERS

(Business Overview, Products Offered, Recent Developments, SWOT Analysis, MnM View)*

12.1.1 BOSTON SCIENTIFIC CORPORATION

TABLE 169 BOSTON SCIENTIFIC CORPORATION: BUSINESS OVERVIEW

FIGURE 26 BOSTON SCIENTIFIC CORPORATION: COMPANY SNAPSHOT (2019)

12.1.2 MEDTRONIC PLC

TABLE 170 MEDTRONIC PLC: BUSINESS OVERVIEW

FIGURE 27 MEDTRONIC PLC: COMPANY SNAPSHOT (2019)

12.1.3 JOHNSON & JOHNSON

TABLE 171 JOHNSON & JOHNSON: BUSINESS OVERVIEW

FIGURE 28 JOHNSON & JOHNSON: COMPANY SNAPSHOT (2019)

12.1.4 TERUMO CORPORATION

TABLE 172 TERUMO CORPORATION: BUSINESS OVERVIEW

FIGURE 29 TERUMO CORPORATION: COMPANY SNAPSHOT (2020)

12.1.5 MERIT MEDICAL SYSTEMS, INC.

TABLE 173 MERIT MEDICAL SYSTEMS, INC.: BUSINESS OVERVIEW

FIGURE 30 MERIT MEDICAL SYSTEMS, INC.: COMPANY SNAPSHOT (2019)

12.1.6 TELEFLEX, INC.

TABLE 174 TELEFLEX, INC.: BUSINESS OVERVIEW

FIGURE 31 TELEFLEX, INC.: COMPANY SNAPSHOT (2020)

12.1.7 ANGIODYNAMICS, INC.

TABLE 175 ANGIODYNAMICS, INC.: BUSINESS OVERVIEW

FIGURE 32 ANGIODYNAMICS: COMPANY SNAPSHOT (2020)

12.1.8 BECTON, DICKINSON AND COMPANY

TABLE 176 BECTON, DICKINSON AND COMPANY: BUSINESS OVERVIEW

FIGURE 33 BECTON, DICKINSON AND COMPANY: COMPANY SNAPSHOT (2020)

12.1.9 HEALTHTRONICS, INC.

TABLE 177 HEALTHTRONICS, INC.: BUSINESS OVERVIEW

12.1.10 TROD MEDICAL

TABLE 178 TROD MEDICAL: BUSINESS OVERVIEW

12.1.11 SANARUS TECHNOLOGIES, INC.

TABLE 179 SANARUS TECHNOLOGIES, INC.: BUSINESS OVERVIEW

12.1.12 IMBIOTECHNOLOGIES LTD.

TABLE 180 IMBIOTECHNOLOGIES LTD.: BUSINESS OVERVIEW

12.1.13 MEDWAVES, INC.

TABLE 181 MEDWAVES, INC.: BUSINESS OVERVIEW

12.1.14 ICECURE MEDICAL

TABLE 182 ICECURE MEDICAL: BUSINESS OVERVIEW

12.1.15 COOK MEDICAL

TABLE 183 COOK MEDICAL: BUSINESS OVERVIEW

12.2 OTHER COMPANIES

12.2.1 PROFOUND MEDICAL CORP.

12.2.2 SIRTEX MEDICAL

12.2.3 BAYLIS MEDICAL COMPANY, INC.

12.2.4 ACCURAY

12.2.5 ALPINION MEDICAL SYSTEMS

*Business Overview, Products Offered, Recent Developments, SWOT Analysis, MnM View might not be captured in case of unlisted companies.

13 APPENDIX

13.1 DISCUSSION GUIDE

13.2 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

13.3 AVAILABLE CUSTOMIZATIONS

13.4 RELATED REPORTS

13.5 AUTHOR DETAILS

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