

# **Interventional Oncology Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type**

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## **Abstracts**

### **Interventional Oncology Market Summary**

#### **Introduction**

Interventional Oncology involves minimally invasive procedures like embolization, ablation, and support devices to treat cancer, used in hospitals, ambulatory surgery centers, and research institutes. These techniques offer targeted therapy, reducing recovery times and improving outcomes. The market is characterized by its role in cancer care, driven by rising cancer incidence (2.04 million new U.S. cases projected in 2025 per American Cancer Society), technological advancements, and demand for minimally invasive treatments. Trends include image-guided ablation, drug-eluting embolization, and AI-enhanced procedures, with growing demand in emerging markets due to healthcare advancements.

#### **Market Size and Growth Forecast**

The global Interventional Oncology market was valued at USD 1.9–2.9 billion in 2024, with an estimated CAGR of 7.5%–9.5% from 2025 to 2030, propelled by cancer prevalence and minimally invasive trends.

#### **Regional Analysis**

North America grows at 7.0%–9.0%; the U.S. leads due to high cancer incidence, with trends focusing on image-guided ablation.

Europe achieves 6.8%–8.8% growth; Germany and the UK drive demand through advanced oncology, emphasizing drug-eluting embolization.

Asia Pacific records 8.0%–10.0% growth; China and Japan are key markets, with trends toward AI-enhanced procedures.

Rest of the World grows at 6.5%–8.5%; Brazil and India show potential, with trends centering on hospital applications.

### Application Analysis

Hospitals expand at 7.8%–9.8%; they drive procedure volume, with trends favoring advanced ablation.

Ambulatory Surgery Centers grow at 7.3%–9.3%; they support outpatient care, emphasizing embolization.

Research & Academic Institutes rise at 6.8%–8.8%; they drive innovation, with trends focusing on AI integration.

### Type Analysis

Embolization Devices expand at 7.5%–9.5%; they target tumor blood supply, with trends favoring drug-eluting beads.

Ablation Devices grow at 7.8%–9.8%; they destroy tumors, emphasizing image-guided systems.

Support Devices rise at 6.8%–8.8%; they aid procedures, with trends focusing on microcatheters.

### Key Market Players

Medtronic, based in Dublin, Ireland, is a leader in oncology devices, offering ablation systems. Medtronic is developing AI-enhanced tools and targeting Asia.

Boston Scientific, headquartered in Marlborough, Massachusetts, USA, provides embolization devices, known for precision. Boston Scientific is targeting Europe.

BD, from Franklin Lakes, New Jersey, USA, supplies support devices, emphasizing reliability. BD is targeting Latin America.

Terumo, based in Tokyo, Japan, offers microcatheters, known for innovation. Terumo is targeting India.

Merit Medical, headquartered in South Jordan, Utah, USA, provides embolization devices, focusing on scalability. Merit is targeting Africa.

AngioDynamics, from Latham, New York, USA, supplies ablation systems, emphasizing efficiency. AngioDynamics is targeting China.

Johnson & Johnson, based in New Brunswick, New Jersey, USA, offers oncology devices, focusing on durability. J&J is targeting Southeast Asia.

Teleflex, headquartered in Wayne, Pennsylvania, USA, provides support devices, known for precision. Teleflex is targeting Brazil.

Cook Medical, from Bloomington, Indiana, USA, supplies embolization devices, emphasizing affordability. Cook is targeting the Middle East.

HealthTronics, based in Austin, Texas, USA, offers ablation services, focusing on outpatient care. HealthTronics is targeting North America.

### Porter's Five Forces Analysis

The threat of new entrants is moderate; high R&D and regulatory barriers deter entry, but cancer demand attracts niche players.

The threat of substitutes is moderate; surgical oncology competes, but minimally invasive procedures retain preference.

Buyer power is moderate; hospitals demand efficacy, but large buyers negotiate pricing.

Supplier power is low; device materials are widely available, reducing supplier leverage.

Competitive rivalry is high; firms differentiate through image-guided systems,

drug-eluting beads, and AI integration.

## Market Opportunities and Challenges

### Opportunities

Rising cancer incidence (618,120 U.S. deaths projected in 2025 per American Cancer Society) drives demand.

AI-enhanced and drug-eluting devices enhance market growth.

Emerging markets offer expansion as oncology care grows in Asia and Africa.

### Challenges

High costs of advanced devices limit adoption in low-resource regions.

Regulatory complexity for oncology devices increases compliance costs.

Intense competition pressures pricing for branded devices.

### Growth Trend Analysis

The Interventional Oncology market is growing robustly, driven by cancer prevalence and minimally invasive trends. Boston Scientific's acquisition of Intera Oncology on November 27, 2024, expands its portfolio. Teleflex's acquisition of Biotronik's Vascular Intervention business on February 27, 2025, and Argon Medical's acquisition of Accurate Medical Therapeutics on January 14, 2025, strengthen offerings. Merit Medical's \$210M device portfolio acquisition on September 18, 2024, Merck's \$1.3bn acquisition of Modifi Biosciences on October 29, 2024, AngioDynamics' NanoKnife study on October 24, 2024, and CancerX's 2025 Accelerator on February 17, 2025, align with a projected CAGR of 7.5%–9.5% through 2030.

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