

Transcatheter Embolization And Occlusion Device Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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Abstracts

Transcatheter Embolization And Occlusion Devices Market Summary

Introduction

Transcatheter embolization and occlusion (TEO) devices, including coils and non-coil solutions, are minimally invasive tools used to block blood flow in treating conditions like cancer (over 19 million cases annually), cardiovascular diseases (e.g., 37.5 million with atrial fibrillation), and aneurysms (250 million unruptured globally). The market is driven by the preference for faster recovery (1-3 days versus 7-10 days) and fewer complications, alongside rising chronic disease prevalence. Innovations like biodegradable materials and AI imaging enhance efficacy. The global market is projected to reach between USD 3.3 billion and USD 5.1 billion in 2025, with a CAGR of 5.8% to 8.2% through 2030.

Regional Analysis

North America: The U.S. leads with high adoption of TEO for oncology, while Canada focuses on vascular care.

Europe: Germany, France, and the UK drive demand due to advanced interventional radiology.

Asia Pacific: China and India see growth from rising cancer rates, while Japan

emphasizes precision embolization.

Rest of the World: Brazil expands minimally invasive procedures, and the Middle East invests in advanced therapies.

Application Analysis

Hospitals: Expected growth of 5.7%-8.1%, driven by complex cases. Trends focus on robotic assistance.

Ambulatory Care Centers (ACS): Projected growth of 5.9%-8.3%, linked to outpatient procedures. Developments emphasize efficiency.

Clinics: Anticipated growth of 5.6%-8.0%, suited for targeted therapies. Advances prioritize accessibility.

Type Analysis

Coil: Expected growth of 5.8%-8.2%, valued for versatility. Trends highlight detachable designs.

Non Coil: Projected growth of 5.7%-8.1%, key for specific occlusions. Advances focus on biodegradable options.

Key Market Players

Leading firms include Medtronic, offering embolization solutions; Boston Scientific Corporation, launching EMBOLD; Stryker, enhancing with Pipeline; Terumo Corporation, introducing AZUR Plug; Johnson & Johnson, advancing vascular tools; Abbott, supporting occlusion tech; Sirtex SIR-Spheres, targeting cancer therapies; and Cordis, focusing on vascular devices.

Porter's Five Forces Analysis

? Threat of New Entrants: Moderate, due to regulatory and technological barriers, though niche innovators can emerge.

? Threat of Substitutes: Low, as TEO devices offer unique minimally invasive benefits.

? Bargaining Power of Buyers: Moderate, with facilities seeking effective, cost-efficient tools, though specialized needs limit options.

? Bargaining Power of Suppliers: Low, with multiple material suppliers.

? Competitive Rivalry: High, with competition on material innovation, precision, and AI integration.

Market Opportunities and Challenges

Opportunities:

? Cancer (19 million cases) and cardiovascular diseases (37.5 million atrial fibrillation cases) drive demand.

? Aging populations (2.1 billion over 60 by 2050) increase needs, while biodegradable materials and robotics enhance outcomes.

? Minimally invasive preferences boost adoption.

Challenges:

? High costs of advanced devices limit access in low-income regions.

? Regulatory delays for new materials slow growth.

? Limited interventional radiologists in rural areas restrict expansion.

Market News

? In June 2022, Boston Scientific Corporation received FDA 510(k) clearance for its EMBOLD Fibered Detachable Coil.

? In July 2021, Terumo Medical Corporation introduced the AZUR Vascular Plug for peripheral artery occlusion.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

3.1 Research Scope

3.2 Research Sources

3.2.1 Data Sources

3.2.2 Assumptions

3.3 Research Method

Chapter Four Market Landscape

4.1 Market Overview

4.2 Classification/Types

4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

5.1 Introduction

5.2 Drivers

5.3 Restraints

5.4 Opportunities

5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

6.1 Upstream/Suppliers Analysis

6.2 Transcatheter Embolization and Occlusion Device Analysis

6.2.1 Technology Analysis

6.2.2 Cost Analysis

6.2.3 Market Channel Analysis

6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

7.1 Latest News

7.2 Merger and Acquisition

7.3 Planned/Future Project

7.4 Policy Dynamics

CHAPTER 8 HISTORICAL AND FORECAST TRANSCATHETER EMBOLIZATION AND OCCLUSION DEVICE MARKET IN NORTH AMERICA (2020-2030)

8.1 Transcatheter Embolization and Occlusion Device Market Size

8.2 Transcatheter Embolization and Occlusion Device Market by End Use

8.3 Competition by Players/Suppliers

8.4 Transcatheter Embolization and Occlusion Device Market Size by Type

8.5 Key Countries Analysis

8.5.1 United States

8.5.2 Canada

8.5.3 Mexico

CHAPTER 9 HISTORICAL AND FORECAST TRANSCATHETER EMBOLIZATION AND OCCLUSION DEVICE MARKET IN SOUTH AMERICA (2020-2030)

9.1 Transcatheter Embolization and Occlusion Device Market Size

9.2 Transcatheter Embolization and Occlusion Device Market by End Use

9.3 Competition by Players/Suppliers

9.4 Transcatheter Embolization and Occlusion Device Market Size by Type

9.5 Key Countries Analysis

9.5.1 Brazil

9.5.2 Argentina

9.5.3 Chile

9.5.4 Peru

CHAPTER 10 HISTORICAL AND FORECAST TRANSCATHETER EMBOLIZATION AND OCCLUSION DEVICE MARKET IN ASIA & PACIFIC (2020-2030)

10.1 Transcatheter Embolization and Occlusion Device Market Size

10.2 Transcatheter Embolization and Occlusion Device Market by End Use

10.3 Competition by Players/Suppliers

10.4 Transcatheter Embolization and Occlusion Device Market Size by Type

10.5 Key Countries Analysis

10.5.1 China

10.5.2 India

10.5.3 Japan

- 10.5.4 South Korea
- 10.5.5 Southeast Asia
- 10.5.6 Australia

CHAPTER 11 HISTORICAL AND FORECAST TRANSCATHETER EMBOLIZATION AND OCCLUSION DEVICE MARKET IN EUROPE (2020-2030)

- 11.1 Transcatheter Embolization and Occlusion Device Market Size
- 11.2 Transcatheter Embolization and Occlusion Device Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Transcatheter Embolization and Occlusion Device Market Size by Type
- 11.5 Key Countries Analysis
 - 11.5.1 Germany
 - 11.5.2 France
 - 11.5.3 United Kingdom
 - 11.5.4 Italy
 - 11.5.5 Spain
 - 11.5.6 Belgium
 - 11.5.7 Netherlands
 - 11.5.8 Austria
 - 11.5.9 Poland
 - 11.5.10 Russia

CHAPTER 12 HISTORICAL AND FORECAST TRANSCATHETER EMBOLIZATION AND OCCLUSION DEVICE MARKET IN MEA (2020-2030)

- 12.1 Transcatheter Embolization and Occlusion Device Market Size
- 12.2 Transcatheter Embolization and Occlusion Device Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Transcatheter Embolization and Occlusion Device Market Size by Type
- 12.5 Key Countries Analysis
 - 12.5.1 Egypt
 - 12.5.2 Israel
 - 12.5.3 South Africa
 - 12.5.4 Gulf Cooperation Council Countries
 - 12.5.5 Turkey

CHAPTER 13 SUMMARY FOR GLOBAL TRANSCATHETER EMBOLIZATION AND OCCLUSION DEVICE MARKET (2020-2025)

- 13.1 Transcatheter Embolization and Occlusion Device Market Size
- 13.2 Transcatheter Embolization and Occlusion Device Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Transcatheter Embolization and Occlusion Device Market Size by Type

CHAPTER 14 GLOBAL TRANSCATHETER EMBOLIZATION AND OCCLUSION DEVICE MARKET FORECAST (2025-2030)

- 14.1 Transcatheter Embolization and Occlusion Device Market Size Forecast
- 14.2 Transcatheter Embolization and Occlusion Device Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Transcatheter Embolization and Occlusion Device Type Forecast

CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS

- 15.1 Medtronic
 - 15.1.1 Company Profile
 - 15.1.2 Main Business and Transcatheter Embolization and Occlusion Device Information
 - 15.1.3 SWOT Analysis of Medtronic
 - 15.1.4 Medtronic Transcatheter Embolization and Occlusion Device Revenue, Gross Margin and Market Share (2020-2025)
- 15.2 Boston Scientific Corporation
 - 15.2.1 Company Profile
 - 15.2.2 Main Business and Transcatheter Embolization and Occlusion Device Information
 - 15.2.3 SWOT Analysis of Boston Scientific Corporation
 - 15.2.4 Boston Scientific Corporation Transcatheter Embolization and Occlusion Device Revenue, Gross Margin and Market Share (2020-2025)
- 15.3 Stryker
 - 15.3.1 Company Profile
 - 15.3.2 Main Business and Transcatheter Embolization and Occlusion Device Information
 - 15.3.3 SWOT Analysis of Stryker
 - 15.3.4 Stryker Transcatheter Embolization and Occlusion Device Revenue, Gross Margin and Market Share (2020-2025)
- 15.4 Terumo Corporation
 - 15.4.1 Company Profile

15.4.2 Main Business and Transcatheter Embolization and Occlusion Device Information

15.4.3 SWOT Analysis of Terumo Corporation

15.4.4 Terumo Corporation Transcatheter Embolization and Occlusion Device Revenue, Gross Margin and Market Share (2020-2025)

15.5 Johnson & Johnson

15.5.1 Company Profile

15.5.2 Main Business and Transcatheter Embolization and Occlusion Device Information

15.5.3 SWOT Analysis of Johnson & Johnson

15.5.4 Johnson & Johnson Transcatheter Embolization and Occlusion Device Revenue, Gross Margin and Market Share (2020-2025)

Please ask for sample pages for full companies list

Tables and Figures

Table Abbreviation and Acronyms

Table Research Scope of Transcatheter Embolization and Occlusion Device Report

Table Data Sources of Transcatheter Embolization and Occlusion Device Report

Table Major Assumptions of Transcatheter Embolization and Occlusion Device Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Transcatheter Embolization and Occlusion Device Picture

Table Transcatheter Embolization and Occlusion Device Classification

Table Transcatheter Embolization and Occlusion Device Applications

Table Drivers of Transcatheter Embolization and Occlusion Device Market

Table Restraints of Transcatheter Embolization and Occlusion Device Market

Table Opportunities of Transcatheter Embolization and Occlusion Device Market

Table Threats of Transcatheter Embolization and Occlusion Device Market

Table Covid-19 Impact For Transcatheter Embolization and Occlusion Device Market

Table Raw Materials Suppliers

Table Different Production Methods of Transcatheter Embolization and Occlusion Device

Table Cost Structure Analysis of Transcatheter Embolization and Occlusion Device

Table Key End Users

Table Latest News of Transcatheter Embolization and Occlusion Device Market

Table Merger and Acquisition

Table Planned/Future Project of Transcatheter Embolization and Occlusion Device Market

Table Policy of Transcatheter Embolization and Occlusion Device Market

Table 2020-2030 North America Transcatheter Embolization and Occlusion Device

Market Size

Figure 2020-2030 North America Transcatheter Embolization and Occlusion Device Market Size and CAGR

Table 2020-2030 North America Transcatheter Embolization and Occlusion Device Market Size by Application

Table 2020-2025 North America Transcatheter Embolization and Occlusion Device Key Players Revenue

Table 2020-2025 North America Transcatheter Embolization and Occlusion Device Key Players Market Share

Table 2020-2030 North America Transcatheter Embolization and Occlusion Device Market Size by Type

Table 2020-2030 United States Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Canada Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Mexico Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 South America Transcatheter Embolization and Occlusion Device Market Size

Figure 2020-2030 South America Transcatheter Embolization and Occlusion Device Market Size and CAGR

Table 2020-2030 South America Transcatheter Embolization and Occlusion Device Market Size by Application

Table 2020-2025 South America Transcatheter Embolization and Occlusion Device Key Players Revenue

Table 2020-2025 South America Transcatheter Embolization and Occlusion Device Key Players Market Share

Table 2020-2030 South America Transcatheter Embolization and Occlusion Device Market Size by Type

Table 2020-2030 Brazil Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Argentina Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Chile Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Peru Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Asia & Pacific Transcatheter Embolization and Occlusion Device Market Size

Figure 2020-2030 Asia & Pacific Transcatheter Embolization and Occlusion Device Market Size and CAGR

Table 2020-2030 Asia & Pacific Transcatheter Embolization and Occlusion Device Market Size by Application

Table 2020-2025 Asia & Pacific Transcatheter Embolization and Occlusion Device Key Players Revenue

Table 2020-2025 Asia & Pacific Transcatheter Embolization and Occlusion Device Key Players Market Share

Table 2020-2030 Asia & Pacific Transcatheter Embolization and Occlusion Device Market Size by Type

Table 2020-2030 China Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 India Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Japan Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 South Korea Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Southeast Asia Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Australia Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Europe Transcatheter Embolization and Occlusion Device Market Size

Figure 2020-2030 Europe Transcatheter Embolization and Occlusion Device Market Size and CAGR

Table 2020-2030 Europe Transcatheter Embolization and Occlusion Device Market Size by Application

Table 2020-2025 Europe Transcatheter Embolization and Occlusion Device Key Players Revenue

Table 2020-2025 Europe Transcatheter Embolization and Occlusion Device Key Players Market Share

Table 2020-2030 Europe Transcatheter Embolization and Occlusion Device Market Size by Type

Table 2020-2030 Germany Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 France Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 United Kingdom Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Italy Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Spain Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Belgium Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Netherlands Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Austria Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Poland Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Russia Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 MEA Transcatheter Embolization and Occlusion Device Market Size

Figure 2020-2030 MEA Transcatheter Embolization and Occlusion Device Market Size and CAGR

Table 2020-2030 MEA Transcatheter Embolization and Occlusion Device Market Size by Application

Table 2020-2025 MEA Transcatheter Embolization and Occlusion Device Key Players Revenue

Table 2020-2025 MEA Transcatheter Embolization and Occlusion Device Key Players Market Share

Table 2020-2030 MEA Transcatheter Embolization and Occlusion Device Market Size by Type

Table 2020-2030 Egypt Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Israel Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 South Africa Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Gulf Cooperation Council Countries Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2030 Turkey Transcatheter Embolization and Occlusion Device Market Size

Table 2020-2025 Global Transcatheter Embolization and Occlusion Device Market Size by Region

Table 2020-2025 Global Transcatheter Embolization and Occlusion Device Market Size Share by Region

Table 2020-2025 Global Transcatheter Embolization and Occlusion Device Market Size by Application

Table 2020-2025 Global Transcatheter Embolization and Occlusion Device Market Share by Application

Table 2020-2025 Global Transcatheter Embolization and Occlusion Device Key Vendors Revenue

Figure 2020-2025 Global Transcatheter Embolization and Occlusion Device Market Size and Growth Rate

Table 2020-2025 Global Transcatheter Embolization and Occlusion Device Key Vendors Market Share

Table 2020-2025 Global Transcatheter Embolization and Occlusion Device Market Size by Type

Table 2020-2025 Global Transcatheter Embolization and Occlusion Device Market Share by Type

Table 2025-2030 Global Transcatheter Embolization and Occlusion Device Market Size

by Region

Table 2025-2030 Global Transcatheter Embolization and Occlusion Device Market Size Share by Region

Table 2025-2030 Global Transcatheter Embolization and Occlusion Device Market Size by Application

Table 2025-2030 Global Transcatheter Embolization and Occlusion Device Market Share by Application

Table 2025-2030 Global Transcatheter Embolization and Occlusion Device Key Vendors Revenue

Figure 2025-2030 Global Transcatheter Embolization and Occlusion Device Market Size and Growth Rate

Table 2025-2030 Global Transcatheter Embolization and Occlusion Device Key Vendors Market Share

Table 2025-2030 Global Transcatheter Embolization and Occlusion Device Market Size by Type

Table 2025-2030 Transcatheter Embolization and Occlusion Device Global Market Share by Type

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