

Biopsy Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Product (Needle-based Biopsy Guns, Biopsy Guidance Systems, Biopsy Forceps, Biopsy Needles, Others), By End Use (Hospitals & Clinics, Ambulatory Care centers, Diagnostic Laboratories, Others), By Region and Competition

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Abstracts

Global Biopsy Devices Market has valued at USD 6.01 billion in 2022 and is anticipated to reach 5.13 billion in the forecast period with a CAGR of 8.63% through 2028. The Biopsy Devices Market is a crucial segment of the medical industry focused on the diagnosis and treatment of various diseases, particularly cancer. These devices play a pivotal role in obtaining tissue samples from the body for further analysis, aiding in the accurate diagnosis and monitoring of medical conditions. Key drivers for the market include the increasing incidence of cancer, the growing aging population, and advancements in biopsy techniques and technologies. Moreover, minimally invasive procedures, such as image-guided and liquid biopsy, are gaining prominence, reducing patient discomfort and recovery time. As healthcare systems worldwide prioritize early disease detection and personalized treatment, the Biopsy Devices Market is expected to witness sustained growth in the years ahead.

Key Market Drivers

Increasing prevalence of cancer

The increasing prevalence of cancer is a compelling driver of the Biopsy Devices Market, fundamentally reshaping the landscape of disease diagnosis, prognosis, and

treatment. This prevalence is a result of multiple interrelated factors, and its impact on the market is profound. First and foremost, cancer incidence is on a relentless rise globally. This alarming trend can be attributed to several factors, including an aging population, lifestyle choices, environmental factors, and genetic predispositions. As people live longer, they are more likely to develop cancer, and this demographic shift has significant implications for healthcare systems. Biopsy devices play a pivotal role in the diagnosis and management of cancer. They enable healthcare providers to obtain tissue samples from suspected tumor sites, allowing for accurate and definitive cancer diagnoses. Additionally, biopsies aid in the determination of cancer type, stage, and genetic markers, all of which are crucial for treatment planning. With the growing recognition of the importance of early cancer detection, individuals and healthcare providers are increasingly inclined to pursue biopsies as a means of identifying cancer at its earliest and most treatable stages. This heightened awareness drives demand for biopsy devices, as timely diagnosis can significantly improve patient outcomes.

Furthermore, the advent of precision medicine has intensified the role of biopsies in cancer care. Biopsy samples provide valuable genetic and molecular information that guides the development of personalized treatment strategies, allowing for targeted therapies and minimizing the potential side effects of conventional treatments like chemotherapy. In conclusion, the increasing prevalence of cancer is a multifaceted driver of the Biopsy Devices Market. As cancer rates continue to surge, the demand for these devices to aid in early detection, accurate diagnosis, and personalized treatment planning will remain robust. The market's growth aligns with the global imperative to improve cancer care and outcomes in the face of this challenging disease.

Growing demand for minimally invasive medical procedures

The Biopsy Devices Market is experiencing a significant boost due to the growing demand for minimally invasive medical procedures. This demand is driven by a convergence of factors that underscore the advantages of less invasive biopsy techniques, reshaping the landscape of diagnostic and interventional medicine. First and foremost, patients increasingly prefer minimally invasive procedures because they typically involve smaller incisions or no incisions at all, resulting in less pain, shorter recovery times, and reduced scarring. These patient-centered benefits make minimally invasive biopsies a preferred choice, ultimately driving the market.

Furthermore, advancements in medical technology have paved the way for the development of minimally invasive biopsy devices that offer enhanced precision and

accuracy. Techniques such as image-guided biopsies, endoscopic biopsies, and robotic-assisted biopsies allow healthcare providers to target specific areas with precision, reducing the risk of complications and improving diagnostic accuracy. Minimally invasive procedures are also associated with shorter hospital stays and reduced healthcare costs, making them an attractive option for healthcare systems and providers aiming to optimize resource utilization. This economic incentive further fuels the demand for biopsy devices designed for minimally invasive use.

In the context of cancer diagnosis and staging, minimally invasive biopsies have become invaluable. They allow for the sampling of tissue from deep-seated or hard-to-reach areas with minimal trauma to the patient. This has transformed the diagnostic process, enabling more accurate staging of cancers and guiding treatment decisions. Lastly, the increasing adoption of minimally invasive techniques extends beyond cancer diagnosis to other medical fields, including gastroenterology, cardiology, and urology, among others. As these specialties incorporate minimally invasive biopsy procedures into their clinical practice, the demand for biopsy devices continues to expand. In summary, the growing demand for minimally invasive medical procedures is a driving force behind the Biopsy Devices Market. Patients' preferences for less invasive, more comfortable procedures, combined with technological advancements and economic considerations, are reshaping the landscape of biopsy techniques and fueling market growth.

New product launches

The Biopsy Devices Market is continually driven by a dynamic landscape of new product launches, which play a pivotal role in shaping the industry's growth trajectory. These launches represent a culmination of innovative technologies, improved patient outcomes, and enhanced diagnostic accuracy. Firstly, new product launches introduce advanced biopsy devices equipped with cutting-edge features. These innovations often lead to more efficient, safer, and more accurate biopsy procedures. For instance, the development of biopsy devices with real-time imaging capabilities, such as ultrasound or MRI-guided devices, enhances the precision of tissue sample collection. These advancements improve the diagnostic yield and reduce the risk of complications, attracting both healthcare providers and patients. Secondly, manufacturers frequently introduce minimally invasive biopsy devices that offer less discomfort and quicker recovery times for patients. This shift aligns with the growing preference for minimally invasive procedures and contributes to market growth. Patients and healthcare providers increasingly opt for these less invasive biopsy solutions, boosting the demand for these new products. Moreover, the launch of biopsy devices with specialized

applications, such as liquid biopsy kits for the detection of circulating tumor cells or genetic mutations, opens up new avenues for diagnostic and treatment decision-making. These niche products cater to specific medical needs and expand the market's scope.

In addition to technological innovations, new product launches often address unmet clinical needs. As medical knowledge advances, there is a constant demand for biopsy devices tailored to emerging disease areas or specialized patient populations. For instance, biopsy devices designed for pediatric patients or for the assessment of rare diseases fill crucial gaps in the market. Furthermore, regulatory approvals and certifications accompany new product launches, ensuring that these devices meet safety and quality standards. This instills confidence among healthcare providers and encourages the adoption of the latest biopsy technologies. Overall, new product launches propel the Biopsy Devices Market forward by introducing innovative solutions that enhance diagnostic capabilities, improve patient experiences, and address evolving clinical demands. These launches continue to shape the industry's growth, ensuring that it remains dynamic and responsive to the ever-changing healthcare landscape.

Increasing Awareness and Early Detection

The Biopsy Devices Market is significantly driven by the increasing awareness of the importance of early detection in disease management and the crucial role that biopsy procedures play in achieving this goal. This heightened awareness has sparked a transformative shift in healthcare, where early diagnosis is prioritized, ultimately propelling the demand for biopsy devices. First and foremost, increasing awareness campaigns, both by healthcare organizations and advocacy groups, have educated the general public about the benefits of early disease detection. These initiatives emphasize that early detection often leads to more successful treatment outcomes and improved prognosis, motivating individuals to seek regular screenings and diagnostic procedures, including biopsies. Moreover, advancements in medical imaging and diagnostic techniques have enabled healthcare providers to identify suspicious lesions or abnormalities earlier than ever before. Once identified, biopsies become a critical tool for confirming diagnoses, determining the extent of disease, and guiding treatment decisions. This diagnostic journey from awareness to biopsy underscores the central role of biopsy devices in modern healthcare. The emphasis on early detection is particularly pronounced in the field of oncology, where cancers diagnosed at an early stage are often more treatable and have better survival rates. Biopsies are instrumental in cancer staging, identifying specific tumor markers, and guiding personalized treatment strategies, further underscoring their importance in the early detection

paradigm.

Furthermore, as healthcare systems worldwide transition toward preventive medicine and proactive healthcare, individuals are increasingly encouraged to undergo regular screenings and diagnostic procedures to identify potential health issues before they progress. Biopsies, being a cornerstone of accurate diagnosis, fit seamlessly into this preventive healthcare framework. In conclusion, the increasing awareness of the significance of early disease detection, coupled with advances in medical technology, has amplified the demand for biopsy devices. These devices are instrumental in translating awareness into action by facilitating timely, accurate diagnoses and enabling healthcare providers to initiate treatment promptly, ultimately improving patient outcomes and driving the Biopsy Devices Market's growth.

Key Market Challenges

High cost of products

The high cost of products in the Biopsy Devices Market presents a significant challenge, impacting various stakeholders, including healthcare providers, patients, and healthcare systems. One of the primary challenges posed by the high cost of biopsy devices is that it can create a financial barrier for patients. Medical expenses, including biopsy procedures, can be substantial, particularly for those without comprehensive health insurance coverage. High out-of-pocket costs may deter individuals from undergoing necessary biopsies, potentially delaying diagnosis and treatment. The cost barrier can exacerbate healthcare disparities, disproportionately affecting individuals with limited financial resources or those residing in underserved regions. This can lead to unequal access to biopsy procedures, resulting in disparities in healthcare outcomes and potentially contributing to health inequalities.

High-cost biopsy devices can impose a financial burden on healthcare systems, particularly in regions with publicly funded healthcare. The allocation of budgets and resources to procure expensive devices can strain healthcare budgets, potentially affecting the overall quality and accessibility of healthcare services. Healthcare facilities must allocate resources carefully to acquire and maintain biopsy devices, which can divert funds from other critical areas of healthcare. Balancing the need for cutting-edge diagnostic tools with other essential medical services can be challenging. The high cost of biopsy devices can impede research and innovation in the field. Limited funding for research and development may slow the introduction of new, more affordable, and improved biopsy technologies. In low-resource settings and developing countries, the

high cost of biopsy devices can severely limit access to essential diagnostic procedures. This can hinder early disease detection, negatively impacting patient outcomes.

Healthcare reimbursement policies and insurance coverage may not always adequately account for the high cost of biopsy devices, creating financial challenges for healthcare providers and institutions. Addressing the challenge of high product costs in the Biopsy Devices Market requires a multifaceted approach. This includes advocating for policies that ensure equitable access to healthcare, exploring cost-effective alternatives, encouraging innovation to reduce device costs, and working collaboratively with healthcare stakeholders to ensure that patients receive timely and affordable biopsy procedures without compromising the quality of care.

Patient Discomfort

Patient discomfort is a significant challenge within the Biopsy Devices Market, as it can affect the patient experience, their willingness to undergo biopsy procedures, and overall healthcare outcomes. Many patients experience anxiety and fear leading up to a biopsy procedure due to concerns about potential pain and discomfort. This anxiety can lead to delayed or avoided screenings and biopsies, which can impact early disease detection. Biopsy procedures often involve inserting a needle or similar device into the body to obtain tissue samples. This process can be painful and cause discomfort, especially in sensitive areas or when multiple samples are needed. Patients may perceive this discomfort as a barrier to undergoing necessary biopsies.

After the biopsy, patients may experience pain, bruising, or discomfort at the biopsy site. This discomfort can persist for varying durations, depending on the type of biopsy and individual factors. It may affect daily activities and overall well-being, leading to dissatisfaction with the procedure. Due to the discomfort associated with biopsy procedures, some patients may be less likely to comply with recommended follow-up biopsies or screenings. This can result in missed opportunities for disease diagnosis, monitoring, or treatment. Certain patient populations, such as children, the elderly, or those with underlying health conditions, may be more susceptible to discomfort during biopsy procedures. Tailoring procedures and pain management strategies for these individuals can be challenging. Effective communication between healthcare providers and patients is essential to address concerns about discomfort and pain associated with biopsies. Providers need to educate patients about what to expect and offer pain management options to alleviate discomfort. To address the challenge of patient discomfort in the Biopsy Devices Market, various strategies can be employed.

Utilizing local anesthesia and pain relief techniques to minimize procedural discomfort. Offering comprehensive information to patients about the biopsy procedure, potential discomfort, and expected outcomes to reduce anxiety. Exploring and promoting minimally invasive biopsy techniques that are associated with reduced pain and shorter recovery times. Providing post-procedure care instructions and support to manage discomfort and promote healing. Investing in research to develop less invasive and more patient-friendly biopsy technologies and devices. By addressing patient discomfort through these strategies, healthcare providers and manufacturers can enhance the patient experience, improve patient compliance with recommended biopsies, and ultimately contribute to better healthcare outcomes.

Key Market Trends

Minimally Invasive Biopsies

Minimally invasive biopsies have emerged as a prominent and transformative trend in the Biopsy Devices Market, revolutionizing the landscape of diagnostic and interventional medicine. This trend is driven by a combination of patient-centered benefits, technological advancements, and a growing emphasis on precision medicine. One of the key drivers of the shift toward minimally invasive biopsies is the reduced patient discomfort and improved experience they offer. Unlike traditional open surgical biopsies, minimally invasive techniques involve smaller incisions or no incisions at all, resulting in less pain, shorter recovery times, and minimal scarring. Patients typically experience less trauma, making these procedures more acceptable and less anxiety-inducing.

Technological innovations have played a pivotal role in the popularity of minimally invasive biopsies. The integration of advanced imaging modalities, such as ultrasound, magnetic resonance imaging (MRI), and computed tomography (CT), allows healthcare providers to precisely target the biopsy site. Real-time imaging guidance enhances accuracy, reduces the risk of complications, and increases diagnostic yield. Additionally, the development of specialized biopsy devices, including fine-needle aspiration and core needle biopsy instruments, enables healthcare professionals to obtain tissue samples with remarkable precision and minimal invasiveness. Minimally invasive biopsies have found particular relevance in the field of oncology. They offer a less traumatic way to obtain tissue samples from tumors and suspicious lesions, making them invaluable for cancer diagnosis, staging, and treatment planning. Patients diagnosed with cancer often undergo multiple biopsies during their journey, making minimally invasive techniques an attractive option to minimize physical and emotional

burdens.

Furthermore, the trend aligns with the broader shift toward precision medicine. By obtaining high-quality tissue samples in a minimally invasive manner, healthcare providers can analyze genetic and molecular information, guiding treatment decisions tailored to the individual patient's unique profile. In summary, minimally invasive biopsies are reshaping the Biopsy Devices Market by prioritizing patient comfort, improving diagnostic accuracy, and facilitating personalized medicine. As patients and healthcare providers increasingly opt for these less invasive biopsy solutions, the trend is expected to continue to gain momentum, ultimately enhancing the effectiveness of biopsy procedures and improving patient outcomes.

Liquid Biopsies

Liquid biopsies have emerged as a transformative and highly promising trend in the Biopsy Devices Market, reshaping the landscape of diagnostics, particularly in oncology. This trend is fueled by the need for less invasive and more accessible methods for detecting and monitoring diseases, with a particular emphasis on cancer. Liquid biopsies represent a revolutionary departure from traditional tissue biopsies. Instead of extracting tissue samples, liquid biopsies involve the analysis of various bodily fluids, such as blood, urine, or cerebrospinal fluid, for the presence of biomarkers, including circulating tumor DNA (ctDNA), circulating tumor cells (CTCs), and exosomes. These biomarkers can provide crucial insights into the presence, characteristics, and progression of various diseases, especially cancer.

One of the primary drivers of liquid biopsies' popularity is their minimally invasive nature. Unlike tissue biopsies, which can be uncomfortable and carry some risks, liquid biopsies require a simple blood draw or urine sample, making them more acceptable to patients. This reduced invasiveness encourages patients to undergo regular monitoring, facilitating early disease detection and intervention. Liquid biopsies offer several distinct advantages, particularly in oncology. They enable the detection of cancer at its earliest stages, even before symptoms manifest, which is crucial for improving survival rates. Additionally, these tests can monitor treatment responses and disease progression over time, providing real-time information to guide treatment decisions. Moreover, liquid biopsies are instrumental in identifying specific genetic mutations and biomarkers, allowing for the personalization of cancer therapies.

Technological advancements, such as next-generation sequencing and digital PCR, have significantly enhanced the sensitivity and specificity of liquid biopsy tests, making

them increasingly reliable for clinical use. As a result, liquid biopsies have found applications in various cancer types, including lung, breast, colorectal, and prostate cancer, among others. Furthermore, liquid biopsies have the potential to expand beyond oncology into other areas of medicine, including infectious diseases, neurology, and cardiology, offering a non-invasive and accessible approach to disease diagnosis and monitoring. In conclusion, liquid biopsies are at the forefront of innovation in the Biopsy Devices Market, providing a less invasive, more patient-friendly, and highly informative approach to disease detection and monitoring, with oncology being a particularly promising domain. As technology continues to advance and clinical validation expands, liquid biopsies are poised to become a standard and indispensable tool in healthcare.

Segmental Insights

Product Insights

Needle-based biopsy guns have emerged as the dominant segment in the Biopsy Devices Market, holding a leading share in 2022. This prominence can be attributed to several compelling factors that make them the preferred choice for obtaining tissue samples in various medical scenarios. First and foremost, needle-based biopsy guns excel in their ability to acquire samples from soft tissues within internal organs such as the kidneys, breasts, and lungs. This versatility and precision are crucial for diagnosing a wide range of medical conditions, including cancers and other abnormalities, making them a versatile tool in the diagnostic arsenal of healthcare providers. The demand for rapid and gentle procurement of cell samples for biopsy procedures is another pivotal factor contributing to the dominance of needle-based biopsy guns. These devices offer a balance between efficiency and patient comfort, minimizing discomfort during the procedure while ensuring accurate sample collection.

Moreover, needle-based biopsy guns are known for their efficiency and reliability. They allow for swift and controlled sample acquisition, reducing the need for multiple passes through the skin and the associated patient discomfort. This efficiency is highly valued by both healthcare professionals and patients. Overall, the widespread adoption of needle-based biopsy guns can be attributed to their versatility, precision, efficiency, and patient-friendly approach. As the need for minimally invasive and accurate diagnostic procedures continues to grow, these devices are expected to maintain their leading position in the Biopsy Devices Market.

End Use Insights

Hospitals and clinics have established themselves as the leading share holders in the Biopsy Devices Market, playing a central role in the landscape of diagnostic and interventional medicine. This dominance can be attributed to several key factors that underscore their significance within the market. First and foremost, hospitals and clinics serve as primary hubs for healthcare delivery, diagnosis, and treatment. They are often the initial points of contact for patients seeking medical care and are equipped with comprehensive diagnostic facilities, including biopsy services. These healthcare facilities offer a wide range of biopsy procedures, catering to the diverse needs of patients across various medical conditions. Furthermore, hospitals and clinics are staffed by skilled medical professionals, including pathologists, radiologists, and surgeons, who are adept at performing biopsies and interpreting biopsy results. Their expertise ensures the accuracy and reliability of biopsy procedures, which is crucial for making critical medical decisions. Hospitals, in particular, have access to state-of-the-art medical equipment and technology, including advanced imaging modalities, which play a pivotal role in guiding biopsy procedures with precision. These resources enhance the quality of biopsies and contribute to improved patient outcomes.

Moreover, the availability of a wide range of healthcare services and specialists within hospitals and clinics fosters collaboration and comprehensive patient care. Patients can seamlessly transition from biopsy procedures to further diagnosis, treatment planning, and follow-up care, all within the same healthcare facility. In summary, the leading share held by hospitals and clinics in the Biopsy Devices Market is a testament to their pivotal role as healthcare providers and diagnostic centers. Their comprehensive services, skilled workforce, access to advanced technology, and ability to provide continuity of care make them central players in facilitating accurate diagnoses and improving patient outcomes through biopsy procedures.

Regional Insights

North America has firmly established itself as the leading share holder in the Biopsy Devices Market, reflecting the region's pivotal role in driving advancements in healthcare, diagnostics, and medical technology. Several key factors contribute to North America's dominant position within this market. Firstly, North America boasts a highly developed and sophisticated healthcare infrastructure. The region is home to world-renowned medical institutions, hospitals, and clinics that offer comprehensive diagnostic and treatment services. These institutions have access to cutting-edge biopsy devices and technology, which are instrumental in ensuring the accuracy and effectiveness of biopsy procedures. Furthermore, North America has a robust research and development ecosystem that continually drives innovation in the field of biopsy devices.

The region is a hub for biomedical research, with numerous academic institutions, research centers, and industry players collaborating to develop new and improved biopsy technologies.

Healthcare professionals in North America are known for their expertise and specialization in various medical fields, including pathology, radiology, and surgery. Their proficiency in performing and interpreting biopsy procedures enhances the quality of patient care and contributes to North America's leadership in this market. Moreover, the region's strong emphasis on early disease detection and prevention has led to a high demand for biopsy procedures. Public health campaigns and healthcare policies prioritize regular screenings, biopsies, and timely interventions, further fueling the market's growth. North America's leadership in the Biopsy Devices Market is a testament to its commitment to advancing healthcare, fostering innovation, and prioritizing patient care. The region's well-established healthcare infrastructure, research capabilities, and skilled healthcare workforce collectively position it at the forefront of the global biopsy devices industry.

Key Market Players

Cardinal Health Inc.

Danaher Corporation

Cook Medical Inc

INRAD, Inc.

Gallini Srl

TransMed7, LLC

Devicor Medical Products Inc.

DTR Corp

Hologic, Inc

CONMED Corporation

Report Scope:

In this report, the Global Biopsy Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Biopsy Devices Market, By Product:

Needle-based Biopsy Guns

Biopsy Guidance Systems

Biopsy Forceps

Biopsy Needles

Others

Biopsy Devices Market, By Needle-based Biopsy Guns:

Vacuum-assisted Biopsy (VAB) Devices

Fine Needle Aspiration Biopsy (FNAB) Devices

Core Needle Biopsy (CNB) devices

Biopsy Devices Market, By Biopsy Guidance Systems:

Manual

Robotic

Biopsy Devices Market, By Biopsy Forceps:

General Biopsy Forceps

Hot Biopsy Forceps

Biopsy Devices Market, By Biopsy Needles:

Disposable

Reusable

Biopsy Devices Market, By Others:

Brushes

Curettes

Punches

Biopsy Devices Market, By End Use:

Hospitals & Clinics

Ambulatory Care centers

Diagnostic Laboratories

Others

Biopsy Devices Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Biopsy Devices Market.

Available Customizations:

Global Biopsy Devices market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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 - 15.6.9. Hologic, Inc
 - 15.6.10. CONMED Corporation

16. STRATEGIC RECOMMENDATIONS

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