

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

Segmented By Product Type (Tissue Biopsy, Liquid Biopsy), By Disease Type (Cancer, Infections, Autoimmune Disorders, Non-Cancerous Indications, Others), By Anatomy (Breast, Lung, Bone, Liver, Uterus/Cervix/Ovary, Abdomen, Prostate, Cardiac, Skin, Others), By Guidance Technique (X-Ray-Guided Biopsy, Ultrasound-Guided Biopsy, MRI-Guided Biopsy, CT-Guided Biopsy) Region and Competition

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Abstracts

Global Biopsy Devices Market has valued at USD 6.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 9.09% through 2028. The Global Biopsy Devices Market is a dynamic and rapidly evolving sector within the healthcare industry, driven by the increasing prevalence of cancer and the need for accurate diagnostic tools. Biopsy devices play a pivotal role in the early detection and precise diagnosis of various diseases, particularly cancer. These devices are instrumental in obtaining tissue samples from the affected area for pathological examination, enabling healthcare professionals to make informed decisions regarding treatment and patient care.

Key factors propelling the growth of the global biopsy devices market include the rising incidence of cancer, technological advancements, and a growing awareness of the importance of early diagnosis. As the aging population increases, the demand for biopsy devices is set to surge, given the higher susceptibility of older individuals to

various diseases, including cancer. Moreover, the development of minimally invasive techniques such as image-guided biopsies and liquid biopsies has expanded the market's scope by reducing patient discomfort and enabling the sampling of hard-to-reach areas.

The market encompasses various types of biopsy devices, including core needle biopsy, fine-needle aspiration, vacuum-assisted biopsy, and biopsy forceps, each designed for specific applications and diagnostic accuracy. Furthermore, the market is also influenced by the advent of cutting-edge technologies like robotics and artificial intelligence, which enhance the precision and efficiency of biopsy procedures.

Key Market Drivers

Rising Cancer Prevalence

The rising prevalence of cancer is a significant driving force behind the growth of the global biopsy devices market. Cancer has become a global health crisis, affecting millions of people across the world. As the incidence of cancer continues to escalate, there is an increasingly urgent need for accurate and timely diagnoses to guide treatment decisions. Biopsy devices have emerged as essential tools in this regard, enabling healthcare professionals to obtain tissue samples from suspicious lesions or tumors, which are then subjected to pathological examination. This process confirms the presence of cancer, identifies its specific type, and determines its stage – critical information that forms the foundation for treatment planning and patient care.

The reasons behind the surge in cancer cases are multifaceted. Factors such as lifestyle choices, environmental exposures, genetic predisposition, and an aging global population all contribute to the increasing cancer burden. With a growing number of people living longer, the risk of cancer rises, as the disease is often associated with age. Furthermore, lifestyle factors like tobacco use, poor diet, and limited physical activity are known contributors to cancer risk, particularly for lung, colorectal, and breast cancers.

The demand for biopsy devices is closely tied to the prevalence of cancer, as the earlier the disease is diagnosed, the better the chances of successful treatment and improved patient outcomes. The biopsy devices market is, therefore, poised to continue its growth trajectory in response to the escalating global cancer epidemic. Patients and healthcare providers alike are recognizing the critical role that these devices play in the battle against cancer, and this increased awareness, coupled with ongoing technological

advancements, is propelling the market forward. As the global community intensifies its efforts to combat cancer through early detection and targeted therapies, the importance of biopsy devices in this fight is undeniable, making them a central driver of market expansion.

Aging Population

The aging population is a significant driver behind the growth of the global biopsy devices market. As the world's demographic landscape shifts, with a notable increase in the elderly population, the demand for healthcare services and diagnostic procedures, including biopsies, is on the rise. Older individuals are more susceptible to various diseases, particularly cancer, which often necessitates the use of biopsy devices for accurate diagnosis and treatment planning.

The aging population is primarily due to increased life expectancy and declining birth rates. In many developed and developing countries, people are living longer, which, while a testament to advancements in healthcare and quality of life, also means a greater likelihood of age-related diseases such as cancer. Cancer incidence and other chronic conditions tend to increase with age, making early detection and accurate diagnosis paramount for effective treatment.

Biopsy devices are instrumental in obtaining tissue samples from elderly patients, as they help healthcare professionals confirm the presence of diseases, identify their specific types, and determine the extent of the disease's progression. With the aging population contributing to a higher incidence of these diseases, there is a growing need for biopsy procedures.

Moreover, elderly individuals often require more frequent healthcare check-ups and diagnostic tests, which can include biopsies to monitor and manage their health conditions. This consistent demand for medical services further fuels the growth of the biopsy devices market.

In regions with a significant aging population, such as North America, Europe, and parts of Asia, the market for biopsy devices is particularly strong. As healthcare systems in these regions adapt to the changing demographics and increased healthcare needs of the elderly, the demand for biopsy devices continues to grow.

Technological Advancements

Technological advancements are playing a pivotal role in driving the growth of the global biopsy devices market. In recent years, the field of medical technology has witnessed remarkable innovations that have enhanced the accuracy, efficiency, and patient experience associated with biopsy procedures. These advancements are not only transforming the diagnostic capabilities of biopsy devices but also expanding their applications and improving patient outcomes.

One of the most significant technological breakthroughs in the field of biopsies is the advent of image-guided biopsies. These procedures employ advanced imaging techniques such as ultrasound, MRI, and CT scans to precisely target and obtain tissue samples. Image-guided biopsies are minimally invasive, reducing the discomfort and complications associated with traditional surgical biopsies. They enable healthcare professionals to sample tissues from difficult-to-reach locations and provide real-time visualization, enhancing diagnostic accuracy.

Liquid biopsies represent another groundbreaking development. These non-invasive tests involve analyzing blood or other bodily fluids to detect genetic mutations, proteins, or other biomarkers associated with cancer and other diseases. Liquid biopsies are less invasive and can be administered more frequently than traditional tissue biopsies, making them a valuable tool in monitoring disease progression and treatment effectiveness.

Furthermore, advanced imaging and pathological analysis software are being integrated into biopsy devices, allowing for more precise targeting of tissue samples. This not only streamlines the biopsy process but also minimizes the chances of errors or complications. Artificial intelligence (AI) and machine learning are also being utilized for image analysis, aiding in the interpretation of biopsy results and ensuring greater diagnostic accuracy.

Robotic systems have made their mark in the field of biopsies, offering unparalleled precision and control during procedures. These systems are capable of performing highly controlled, minimally invasive biopsies, further reducing patient discomfort and recovery times. They are particularly beneficial in cases where extreme precision is required, such as brain biopsies.

These technological advancements are not only improving the patient's experience but are also reducing the burden on healthcare providers by streamlining procedures and enhancing diagnostic accuracy. They are enabling more accurate and earlier disease detection, which is crucial for improving patient outcomes, especially in cases of cancer.

Key Market Challenges

High Cost of Biopsy Procedures

The high cost of biopsy procedures stands as a significant barrier to the growth and accessibility of the global biopsy devices market. Biopsy devices, crucial for diagnosing diseases like cancer, are often associated with a considerable financial burden for both patients and healthcare systems, impacting the market's expansion and patient outcomes.

The cost of biopsy procedures comprises various components, including the expense of specialized equipment, professional fees, diagnostic tests, and post-procedural care. These collective costs can deter individuals from seeking early diagnostic procedures, potentially leading to delayed disease detection and treatment initiation.

One of the primary financial challenges for patients is out-of-pocket expenses. Even with insurance coverage, many patients are responsible for substantial co-pays, deductibles, and other costs associated with biopsy procedures. In some cases, these costs can be a barrier to accessing essential healthcare services, especially for those with limited financial resources.

Healthcare providers and institutions also grapple with the high costs of biopsy procedures. Acquiring and maintaining biopsy equipment, ensuring a skilled workforce, and navigating the complex landscape of reimbursement for these procedures can strain healthcare budgets. Additionally, the cost of regulatory compliance, which ensures patient safety and the quality of diagnostic services, places additional financial burdens on providers and manufacturers of biopsy devices.

Lack of Skilled Personnel

The global biopsy devices market faces a significant hurdle in the form of a shortage of skilled personnel, hindering its growth and effectiveness. Biopsy procedures, whether traditional surgical or minimally invasive techniques, require a high level of expertise to ensure precision and patient safety. The shortage of trained healthcare professionals capable of performing these procedures has created challenges that impact patient access and the overall efficiency of the biopsy devices market.

One of the primary areas affected by the lack of skilled personnel is the rural and

underserved regions of many countries. In these areas, access to advanced healthcare facilities and trained medical staff is limited. As a result, individuals residing in rural and remote areas often have to travel long distances to access biopsy services or may miss out on these critical diagnostic procedures altogether. This geographical disparity in healthcare access can lead to delayed disease detection and poorer patient outcomes.

Moreover, the healthcare workforce, including pathologists, radiologists, and specialized technicians, often faces increased workloads due to the shortage of skilled personnel. The demand for biopsy procedures continues to grow, as does the complexity and diversity of the cases that healthcare professionals encounter. In such an environment, healthcare providers may find it challenging to meet the rising demand for biopsy services, which can lead to longer waiting times for patients.

Key Market Trends

Growth of Minimally Invasive Techniques

The global biopsy devices market is experiencing a significant boost, thanks to the remarkable growth of minimally invasive techniques. Traditional surgical biopsies, while effective, often involve invasive procedures that can be associated with patient discomfort, longer recovery times, and potential complications. However, the emergence and widespread adoption of minimally invasive biopsy techniques have transformed the landscape of diagnostic procedures, propelling the market forward.

Minimally invasive biopsy techniques encompass a range of procedures, including fine-needle aspiration, core needle biopsy, and image-guided biopsies. These techniques offer several advantages that contribute to their popularity and their positive impact on the biopsy devices market.

minimally invasive biopsies are less invasive by nature, which reduces patient discomfort and leads to quicker recovery times. Patients typically experience less pain and require shorter hospital stays, making these procedures more patient-friendly.

Another crucial advantage is the ability to target hard-to-reach or deep-seated lesions with precision. Image-guided biopsies, for instance, employ advanced imaging technologies such as ultrasound, MRI, or CT scans to guide the biopsy device to the exact location of the tissue of interest. This enhances diagnostic accuracy by ensuring that the sample collected is representative of the suspicious area.

Moreover, minimally invasive techniques are well-suited for repeated procedures, allowing for ongoing monitoring and follow-up without causing excessive discomfort to the patient. This capability is particularly valuable in the management of chronic conditions and diseases like cancer, where regular monitoring is crucial.

The growth of minimally invasive biopsy techniques is not only transforming the patient experience but also addressing the challenges associated with the traditional, more invasive approaches. The reduction in patient discomfort, shorter recovery periods, and improved precision of tissue sampling have led to greater patient acceptance and willingness to undergo these procedures.

Rise in Liquid Biopsies

The global biopsy devices market is experiencing a significant boost, thanks to the growing popularity of liquid biopsies. Liquid biopsies are non-invasive diagnostic tests that involve the analysis of bodily fluids, such as blood or urine, to detect genetic mutations, proteins, or other biomarkers associated with diseases, particularly cancer. This innovative approach to diagnostics is revolutionizing the healthcare industry and contributing to the market's expansion.

One of the key factors driving the adoption of liquid biopsies is their non-invasive nature. Unlike traditional tissue biopsies that require the removal of tissue samples through invasive procedures, liquid biopsies offer a far less intrusive means of monitoring and diagnosing diseases. Patients are spared the discomfort and potential complications associated with surgical biopsies, making liquid biopsies a more patient-friendly option.

The rise in liquid biopsies is especially prominent in the field of oncology. These tests are particularly valuable in cancer diagnostics, where early detection is pivotal for improving patient outcomes. Liquid biopsies can detect genetic mutations, circulating tumor cells, and tumor-derived DNA fragments, providing a real-time glimpse into the genetic makeup and progression of a patient's cancer. This allows healthcare providers to tailor treatment plans more effectively, monitor treatment responses, and detect potential recurrences at an earlier stage.

The growing demand for liquid biopsies is reshaping the landscape of the biopsy devices market. Manufacturers are developing specialized tools and equipment to facilitate the collection and analysis of liquid biopsy samples with precision and accuracy. These devices are designed to handle a variety of bodily fluids, ensuring the integrity of the collected biomarkers.

Liquid biopsies are becoming an integral part of personalized medicine, where treatment strategies are tailored to an individual's unique genetic and molecular profile. As healthcare systems worldwide place a greater emphasis on personalized medicine, the demand for biopsy devices that support liquid biopsy procedures is expected to continue to rise.

Segmental Insights

Product Type Insights

Based on the Product Type, Tissue biopsy emerged as the dominant segment in the global market for Global Biopsy Devices Market in 2022. Tissue biopsy has been a cornerstone of medical diagnosis for decades. Its long history of clinical use has established it as a well-accepted and trusted method for diagnosing various diseases, including cancer. Physicians and pathologists are experienced in interpreting tissue biopsy results, which adds to its credibility. Tissue biopsy is often considered the gold standard for diagnosing many diseases, particularly cancer. It provides a direct sample of the affected tissue, offering a comprehensive view of the cellular and structural changes. This high level of diagnostic accuracy is crucial in making informed treatment decisions. Tissue biopsies offer tissue-specific information, enabling precise diagnosis and staging of diseases. Liquid biopsies, while valuable for detecting certain biomarkers, may not offer the same tissue-specific information.

Anatomy Insights

Based on the Anatomy, Breast emerged as the dominant segment in the global market for Global Biopsy Devices Market in 2022. Breast cancer is one of the most common cancers worldwide, particularly among women. The high prevalence of breast cancer necessitates a significant number of diagnostic procedures, including biopsies, to confirm and stage the disease. Breast cancer screening programs, such as mammography and clinical breast examinations, aim to detect cancer at early, more treatable stages. These programs often lead to the identification of suspicious breast lesions that require further evaluation through biopsy procedures. Breast tissue can develop a wide range of lesions, including benign and malignant tumors. As a result, breast biopsies are frequently performed to distinguish between various lesion types, with each requiring different treatment approaches. Increased awareness and advocacy efforts surrounding breast cancer have encouraged individuals to undergo regular screenings and seek early diagnosis. Patient empowerment and engagement contribute

to the demand for breast biopsies.

Regional Insights

North America emerged as the dominant player in the global Biopsy Devices Market in 2022, holding the largest market share. North America has a relatively high prevalence of cancer, and cancer remains a leading cause of mortality in the region. The need for accurate and timely cancer diagnosis drives the demand for biopsy devices. Early cancer detection and personalized treatment are prioritized, leading to a robust market for biopsy devices. The healthcare systems in North America place a strong emphasis on early disease detection, including cancer. Routine cancer screenings and diagnostic procedures are part of standard healthcare practices. Biopsies are central to early diagnosis and staging, contributing to their significant demand in the region.

Key Market Players

Argon Medical Devices, Inc.

B. Braun SE

Becton, Dickinson and Company

Boston Scientific Corporation

Cardinal Health, Inc.

Cook Medical Inc.

Conmed Corporation

FUJIFILM Holdings Corporation

GE HealthCare

Inrad, Inc

Report Scope:

In this report, the Global Biopsy Devices Market has been segmented into the following

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categories, in addition to the industry trends which have also been detailed below:

Global Biopsy Devices Market, By Product Type:

Tissue Biopsy

Liquid Biopsy

Global Biopsy Devices Market, By Disease Type:

Cancer

Infections

Autoimmune Disorders

Non-Cancerous Indications

Others

Global Biopsy Devices Market, By Anatomy:

Breast

Lung

Bone

Liver

Uterus/Cervix/Ovary

Abdomen

Prostate

Cardiac

Skin

Others

Global Biopsy Devices Market, By Guidance Technique:

X-Ray-Guided Biopsy

Ultrasound-Guided Biopsy

MRI-Guided Biopsy

CT-Guided Biopsy

Global 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

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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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. GLOBAL BIOPSY DEVICES MARKET OUTLOOK

- 4.1. Market Size & Forecast
 - 4.1.1. By Value
- 4.2. Market Share & Forecast
 - 4.2.1. By Product Type (Tissue Biopsy, Liquid Biopsy)
 - 4.2.2. By Disease Type (Cancer, Infections, Autoimmune Disorders, Non-Cancerous Indications, Others)
 - 4.2.3. By Anatomy (Breast, Lung, Bone, Liver, Uterus/Cervix/Ovary, Abdomen, Prostate, Cardiac, Skin, Others)
 - 4.2.4. By Guidance Technique (X-Ray-Guided Biopsy, Ultrasound-Guided Biopsy, MRI-

Guided Biopsy, CT-Guided Biopsy)

4.2.5. By Region

4.2.6. By Company (2022)

4.3. Market Map

4.3.1. By Product Type

4.3.2. By Disease Type

4.3.3. By Anatomy

4.3.4. By Guidance Technique

4.3.5. By Region

5. ASIA PACIFIC BIOPSY DEVICES MARKET OUTLOOK

5.1. Market Size & Forecast

5.1.1. By Value

5.2. Market Share & Forecast

5.2.1. By Product Type

5.2.2. By Disease Type

5.2.3. By Anatomy

5.2.4. By Guidance Technique

5.2.5. By Country

5.3. Asia Pacific: Country Analysis

5.3.1. China Biopsy Devices Market Outlook

5.3.1.1. Market Size & Forecast

5.3.1.1.1. By Value

5.3.1.2. Market Share & Forecast

5.3.1.2.1. By Product Type

5.3.1.2.2. By Disease Type

5.3.1.2.3. By Anatomy

5.3.1.2.4. By Guidance Technique

5.3.2. India Biopsy Devices Market Outlook

5.3.2.1. Market Size & Forecast

5.3.2.1.1. By Value

5.3.2.2. Market Share & Forecast

5.3.2.2.1. By Product Type

5.3.2.2.2. By Disease Type

5.3.2.2.3. By Anatomy

5.3.2.2.4. By Guidance Technique

5.3.3. Australia Biopsy Devices Market Outlook

5.3.3.1. Market Size & Forecast

- 5.3.3.1.1. By Value
- 5.3.3.2. Market Share & Forecast
 - 5.3.3.2.1. By Product Type
 - 5.3.3.2.2. By Disease Type
 - 5.3.3.2.3. By Anatomy
 - 5.3.3.2.4. By Guidance Technique
- 5.3.4. Japan Biopsy Devices Market Outlook
 - 5.3.4.1. Market Size & Forecast
 - 5.3.4.1.1. By Value
 - 5.3.4.2. Market Share & Forecast
 - 5.3.4.2.1. By Product Type
 - 5.3.4.2.2. By Disease Type
 - 5.3.4.2.3. By Anatomy
 - 5.3.4.2.4. By Guidance Technique
- 5.3.5. South Korea Biopsy Devices Market Outlook
 - 5.3.5.1. Market Size & Forecast
 - 5.3.5.1.1. By Value
 - 5.3.5.2. Market Share & Forecast
 - 5.3.5.2.1. By Product Type
 - 5.3.5.2.2. By Disease Type
 - 5.3.5.2.3. By Anatomy
 - 5.3.5.2.4. By Guidance Technique

6. EUROPE BIOPSY DEVICES MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Product Type
 - 6.2.2. By Disease Type
 - 6.2.3. By Anatomy
 - 6.2.4. By Guidance Technique
 - 6.2.5. By Country
- 6.3. Europe: Country Analysis
 - 6.3.1. France Biopsy Devices Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Product Type

- 6.3.1.2.2. By Disease Type
- 6.3.1.2.3. By Anatomy
- 6.3.1.2.4. By Guidance Technique
- 6.3.2. Germany Biopsy Devices Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Product Type
 - 6.3.2.2.2. By Disease Type
 - 6.3.2.2.3. By Anatomy
 - 6.3.2.2.4. By Guidance Technique
- 6.3.3. Spain Biopsy Devices Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Product Type
 - 6.3.3.2.2. By Disease Type
 - 6.3.3.2.3. By Anatomy
 - 6.3.3.2.4. By Guidance Technique
- 6.3.4. Italy Biopsy Devices Market Outlook
 - 6.3.4.1. Market Size & Forecast
 - 6.3.4.1.1. By Value
 - 6.3.4.2. Market Share & Forecast
 - 6.3.4.2.1. By Product Type
 - 6.3.4.2.2. By Disease Type
 - 6.3.4.2.3. By Anatomy
 - 6.3.4.2.4. By Guidance Technique
- 6.3.5. United Kingdom Biopsy Devices Market Outlook
 - 6.3.5.1. Market Size & Forecast
 - 6.3.5.1.1. By Value
 - 6.3.5.2. Market Share & Forecast
 - 6.3.5.2.1. By Product Type
 - 6.3.5.2.2. By Disease Type
 - 6.3.5.2.3. By Anatomy
 - 6.3.5.2.4. By Guidance Technique

7. NORTH AMERICA BIOPSY DEVICES MARKET OUTLOOK

7.1. Market Size & Forecast

- 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product Type
 - 7.2.2. By Disease Type
 - 7.2.3. By Guidance Technique
 - 7.2.4. By Anatomy
 - 7.2.5. By Country
- 7.3. North America: Country Analysis
 - 7.3.1. United States Biopsy Devices Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Product Type
 - 7.3.1.2.2. By Disease Type
 - 7.3.1.2.3. By Anatomy
 - 7.3.1.2.4. By Guidance Technique
 - 7.3.2. Mexico Biopsy Devices Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Product Type
 - 7.3.2.2.2. By Disease Type
 - 7.3.2.2.3. By Anatomy
 - 7.3.2.2.4. By Guidance Technique
 - 7.3.3. Canada Biopsy Devices Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Product Type
 - 7.3.3.2.2. By Disease Type
 - 7.3.3.2.3. By Anatomy
 - 7.3.3.2.4. By Guidance Technique

8. SOUTH AMERICA BIOPSY DEVICES MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Product Type

- 8.2.2. By Disease Type
- 8.2.3. By Guidance Technique
- 8.2.4. By Country
- 8.3. South America: Country Analysis
 - 8.3.1. Brazil Biopsy Devices Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product Type
 - 8.3.1.2.2. By Disease Type
 - 8.3.1.2.3. By Anatomy
 - 8.3.1.2.4. By Guidance Technique
 - 8.3.2. Argentina Biopsy Devices Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product Type
 - 8.3.2.2.2. By Disease Type
 - 8.3.2.2.3. By Anatomy
 - 8.3.2.2.4. By Guidance Technique
 - 8.3.3. Colombia Biopsy Devices Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product Type
 - 8.3.3.2.2. By Disease Type
 - 8.3.3.2.3. By Anatomy
 - 8.3.3.2.4. By Guidance Technique

9. MIDDLE EAST AND AFRICA BIOPSY DEVICES MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product Type
 - 9.2.2. By Drug Product Type
 - 9.2.3. By Anatomy
 - 9.2.4. By Guidance Technique
 - 9.2.5. By Country

9.3. MEA: Country Analysis

9.3.1. South Africa Biopsy Devices Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Product Type

9.3.1.2.2. By Disease Type

9.3.1.2.3. By Anatomy

9.3.1.2.4. By Guidance Technique

9.3.2. Saudi Arabia Biopsy Devices Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Product Type

9.3.2.2.2. By Drug Product Type

9.3.2.2.3. By Anatomy

9.3.2.2.4. By Guidance Technique

9.3.3. UAE Biopsy Devices Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Product Type

9.3.3.2.2. By Disease Type

9.3.3.2.3. By Anatomy

9.3.3.2.4. By Guidance Technique

9.3.4. Egypt Biopsy Devices Market Outlook

9.3.4.1. Market Size & Forecast

9.3.4.1.1. By Value

9.3.4.2. Market Share & Forecast

9.3.4.2.1. By Product Type

9.3.4.2.2. By Disease Type

9.3.4.2.3. By Anatomy

9.3.4.2.4. By Guidance Technique

10. MARKET DYNAMICS

10.1. Drivers

10.2. Challenges

11. MARKET TRENDS & DEVELOPMENTS

- 11.1. Recent Developments
- 11.2. Product Launches
- 11.3. Mergers & Acquisitions

12. GLOBAL BIOPSY DEVICES MARKET: SWOT ANALYSIS

13. PORTER'S FIVE FORCES ANALYSIS

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Product

14. COMPETITIVE LANDSCAPE

- 14.1. Argon Medical Devices, Inc.
 - 14.1.1. Business Overview
 - 14.1.2. Company Snapshot
 - 14.1.3. Products & Services
 - 14.1.4. Current Capacity Analysis
 - 14.1.5. Financials (In case of listed)
 - 14.1.6. Recent Developments
 - 14.1.7. SWOT Analysis
- 14.2. B. Braun SE
- 14.3. Becton, Dickinson and Company
- 14.4. Boston Scientific Corporation
- 14.5. Cardinal Health, Inc.
- 14.6. Cook Medical Inc.
- 14.7. Conmed Corporation
- 14.8. FUJIFILM Holdings Corporation
- 14.9. GE HealthCare
- 14.10. Inrad, Inc.

15. STRATEGIC RECOMMENDATIONS

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