

Liquid Embolic Agent Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Ethylene Vinyl Alcohol Copolymer (EVOH), Cyanoacrylates, Others), By Application (Arteriovenous Malformations (AVM), Hypervascularity Tumors, Peripheral Vasculature Haemorrhage, Others), By Region and Competition, 2020-2030F

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Abstracts

Market Overview

Global Liquid Embolic Agent Market was valued at USD 255.48 Million in 2024 and is expected to reach USD 366.13 Million by 2030 with a CAGR of 6.38%. Liquid embolic agents are specialized medical substances used to occlude (block) abnormal blood vessels or blood flow during interventional radiology procedures. These agents are typically used in the treatment of neurovascular and peripheral vascular diseases and are administered via catheters in image-guided settings. One of the primary factors contributing to market expansion is the global rise in vascular-related diseases, particularly in aging populations.

Additionally, the growing preference for minimally invasive surgical techniques is supporting market growth, as these procedures generally result in fewer complications, shorter hospital stays, and reduced overall healthcare costs. Despite these favorable trends, the market faces certain challenges. The high cost associated with embolization procedures and the embolic agents themselves can be a significant barrier, especially in low- and middle-income countries.

Key Market Drivers

Growth in Healthcare Industry

The ongoing expansion of the global healthcare industry serves as a significant catalyst for the growth of the liquid embolic agent market. The global healthcare industry generates annual sales exceeding USD 4 trillion. The most significant and profitable segments are pharmaceuticals and biotechnology, with revenues approaching USD 850 billion, followed by medical technology and diagnostics, which generate over USD 400 billion. As healthcare infrastructure improves and investment in advanced medical technologies increases worldwide, the demand for minimally invasive procedures particularly in the fields of interventional radiology and neurovascular treatment continues to rise.

Liquid embolic agents, which are critical in procedures such as the treatment of arteriovenous malformations (AVMs), aneurysms, and tumors, are benefiting directly from these trends. For instance, Onyx has proven to be a safe and effective option for the embolization of brain arteriovenous malformations (AVMs). It enables complete obliteration in smaller AVMs, while larger AVMs can be sufficiently reduced in size to facilitate subsequent surgical or radiosurgical intervention. The rising prevalence of chronic conditions, especially neurological and oncological disorders, has further heightened the need for targeted, safe, and effective embolization solutions.

Key Market Challenges

Need for Specialized Skills and Training

A significant challenge facing the global liquid embolic agent market is the critical need for specialized skills and comprehensive training among healthcare professionals. The administration of liquid embolic agents requires advanced technical expertise, as these procedures involve precise catheter navigation and controlled delivery of embolic materials within complex vascular structures. Ensuring procedural success and minimizing risks such as non-target embolization or vessel damage depend heavily on the proficiency of interventional radiologists, neurosurgeons, and related specialists.

However, there is a notable shortage of adequately trained personnel with the necessary experience and knowledge to perform these highly intricate procedures, particularly in emerging and underdeveloped regions. The lack of standardized training

programs and limited access to hands-on learning opportunities further exacerbate this issue. This skills gap poses a barrier to the widespread adoption of liquid embolic agents, restricting their availability to select medical centers with specialized expertise.

Key Market Trends

Rising Prevalence of Oncology Conditions

The increasing incidence of oncology-related conditions worldwide is emerging as a prominent trend driving the growth of the global liquid embolic agent market. In 2022, there were approximately 20 million new cancer diagnoses and 9.7 million cancer-related deaths globally. The estimated number of individuals surviving at least five years post-diagnosis reached 53.5 million. Statistically, one in five people will develop cancer during their lifetime, with mortality rates of approximately one in nine for men and one in twelve for women.

With cancer cases on the rise due to factors such as aging populations, lifestyle changes, and environmental influences, there is a growing demand for innovative and minimally invasive treatment options. Liquid embolic agents play a critical role in oncological interventions, particularly in the targeted management of tumors through embolization techniques. These agents are used to selectively block blood flow to tumors, thereby inhibiting their growth and enhancing the effectiveness of adjunct therapies such as chemotherapy and radiation.

Key Market Players

Johnson & Johnson Services, Inc.

Medtronic Plc

B. Braun SE

Terumo Corporation

Boston Scientific Corporation

Balt

Blacks wan Vascular, Inc.

INVAMED

Meril

Gem srl

Report Scope

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

Liquid Embolic Agent Market, By Product Type:

Ethylene Vinyl Alcohol Copolymer (EVOH)

Cyanoacrylates

Others

Liquid Embolic Agent Market, By Application:

Arteriovenous Malformations (AVM)

Hypervascularity Tumors

Peripheral Vasculature Haemorrhage

Others

Liquid Embolic Agent 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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Liquid Embolic Agent Market.

Available Customizations:

Global Liquid Embolic Agent Market report with the given market data, TechSci 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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