

# **Breast-conserving Surgery Market Size, Share & Trends Analysis Report By Procedure (Lumpectomy, Quadrantectomy, Segmental Mastectomy), By Product (Margin Assessment Devices), By End-use, By Region, And Segment Forecasts, 2025 - 2033**

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## **Abstracts**

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### **Breast-conserving Surgery Market Summary**

The global breast-conserving surgery market size was estimated at USD 2.45 billion in 2024 and is projected to reach USD 4.58 billion by 2033, growing at a CAGR of 7.26% from 2025 to 2033. The growth is attributed to the rising incidence of breast cancer and a growing emphasis on early detection and intervention.

There is an increasing preference among patients for procedures that preserve both cosmetic appearance and breast function, driving demand for less invasive surgical options. For instance, according to a report by the American Cancer Society, in 2024, an estimated 310,720 new cases of invasive breast cancer and 56,500 cases of ductal carcinoma in situ (DCIS) are expected to be diagnosed among women in the U.S. Additionally, 42,250 women are projected to lose their lives to breast cancer. The rising preference for cosmetic and functional preservation drives growth in the breast-conserving surgery (BCS) market.

Unlike traditional mastectomy, which involves the complete removal of the breast, BCS focuses on excising the tumor while retaining as much of the natural breast tissue and appearance as possible. This approach aligns with the increasing demand from patients, especially younger women, for procedures that not only treat cancer effectively

but also maintain physical aesthetics, body image, and quality of life. Functional benefits such as preserved sensation and less physical trauma contribute to improved emotional well-being and postoperative satisfaction.

The rising prevalence of breast cancer is a primary driver of the BCS market, as it directly increases the number of patients requiring surgical intervention. With improved awareness, widespread screening programs, and advancements in diagnostic technologies, more breast cancers are being detected at earlier stages-making a larger proportion of patients eligible for breast-conserving procedures instead of full mastectomy. Early-stage diagnosis not only supports better outcomes but also aligns with growing patient preferences for less invasive treatments that preserve breast appearance and function. As the global burden of breast cancer continues to rise, healthcare systems are increasingly integrating BCS into standard care pathways, fueling demand for specialized surgical tools, localization technologies, and post-operative care solutions.

Technological advancements in wireless localization and AI-based margin assessment are revolutionizing the breast-conserving surgery (BCS) market, significantly improving surgical precision, reducing reoperation rates, and enhancing patient outcomes. Traditionally, wire-guided localization was used to pinpoint tumor sites, but this method posed several challenges, such as patient discomfort, scheduling constraints, and the risk of wire displacement. In contrast, wireless localization systems (e.g., RFID or magnetic seed-based technologies) offer greater flexibility, improved accuracy, and a better overall surgical experience for both patients and surgeons.

Simultaneously, AI-powered margin assessment tools are transforming intraoperative decision-making. These technologies analyze tissue samples in real-time to determine if cancerous cells remain at the surgical margins, allowing surgeons to make immediate adjustments and achieve clean margins during the first procedure. This greatly reduces the need for second surgeries, shortens recovery time, and improves clinical efficiency.

## Global Breast-conserving Surgery Market Report Segmentation

This report forecasts revenue growth at the global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the global breast-conserving surgery market report on the basis of procedure, product, end use, and region:

Procedure Outlook (Revenue, USD Million, 2021 - 2033)

Lumpectomy

Quadrantectomy

Segmental Mastectomy

Product Outlook (Revenue, USD Million, 2021 - 2033)

Tumor Localization Devices

Wire-guided localization

Magnetic seed localization

Radar-based localization

Others

Surgical Excision Devices

Electrosurgical units/devices

Scalpels/forceps/retractors/clamps

Vacuum-assisted biopsy systems

Others

Margin Assessment Devices

Intraoperative Imaging & Navigation Devices

End Use Outlook (Revenue, USD Million, 2021 - 2033)

Hospitals

Ambulatory Surgery Centers

Oncology/Specialty Clinics

Others

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

UK

Germany

France

Italy

Spain

Denmark

Sweden

Norway

Asia Pacific

Japan

China

India

Australia

Thailand

South Korea

Latin America

Brazil

Argentina

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

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