

Global Breast Reconstruction Market - Forecasts from 2020 to 2025

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Abstracts

The global breast reconstruction market is predicted to grow at a CAGR of 6.02% from a market value of USD1,147.085 million in 2019 to reach a market value of USD1,692.005 million by the end of 2025. Breast reconstruction is referred to as a surgical procedure that involves the restoration of the shape of breasts after a mastectomy procedure. Mastectomy is required in order to treat or prevent a patient from breast cancer. Hence, with the growing incidences of breast cancer at the global level, the market is projected to show strong growth prospects during the forecast period. Also, the growing demand for immediate breast reconstruction procedures following mastectomy is further providing an opportunity for the market to thrive in the forecast period.

The reconstruction surgery involves implants in order to reshape the breasts or may involve reconstruction using their own body tissues. Other types of reconstruction in order to reshape breasts include breast reduction, breast lift, and revision of scar.

Furthermore, with technological advancements and companies offering varied products in the form of implants or mesh, the market for breast reconstruction holds favourable growth prospects during the forecast period.

On the basis of geography, North America and Europe are projected to hold significant market share in the global breast reconstruction market with advanced healthcare facilities in these regions. Additionally, the presence of major market players offering advanced breast reconstruction products is further propelling the market growth in these regions during the forecast period. For example, Sientra, a public medical device company, headquartered in Santa Barbara, CA, United States offers breast implants with high strength cohesive silicone gel. The FDA approved breast implants are

available to the board-certified and board-eligible plastic surgeons only.

On the other hand, the Asia Pacific region is projected to grow with a high growth rate over the next five years due to increasing awareness regarding breast reconstruction procedures.

COVID-19 impact on breast reconstruction market: It has been analyzed that with the onset of novel coronavirus pandemic, there have been significant changes in the treatment of breast cancer and breast reconstruction at the international level. Mastectomy along with immediate implant-based breast reconstruction was increasing owing to the advancements in meshes and implants. It was however assessed that due to the prioritization of the critically-ill patients due to COVID-19 infections, breast cancer treatments have been affected. Also, with the diversification of the workforce, the breast reconstruction market is projected to experience a set-back in 2020 in comparison to the previous years. The current outbreak of novel coronavirus has brought in a change in the practice of the breast oncological surgical procedure. It has put a strong impact on the diagnosis and treatment of breast cancer patients as a shift towards the treatment of patients suffering from COVID-19 is noticed. It was further observed that hospitals in the United Kingdom, Europe, and the United States of America have put restrictions on their operating room (OR) timings to attend emergency services only. The hospitals are facing problems due to lack of ventilators, and this has further reduced the resources in OR to a greater extent. Furthermore, with hospitals and wards restricted to novel coronavirus infected patients and only a few beds are available for emergency surgery and urgent hospitalization, the market is projected to decline with restrictions in immediate breast reconstruction surgeries in 2020. However, delayed breast reconstruction with minimal complications is being preferred.

The growing demand for plastic surgery among consumers will continue to proliferate the market demand during the forecast period.

According to a press release on September 2018, by American Society of Plastic Surgeons (ASPS), a new survey reveals that board-certified plastic surgeons are keenly interested in adopting novel techniques, procedures, and advancements over next 10 years in order to keep pace with the surging consumer demands for various procedures. This is mainly due to the fact that the demand for plastic surgery is soaring year-on-year among a range of consumers. It was noticed that in 2017, over 17.5 million surgical and minimally invasive cosmetic procedures were done in the United States. The American Society of Plastic Surgeons, as per their survey, predicted the following emerging consumer trends regarding cosmetic and reconstructive surgery for the next ten years.

It was analyzed that over the next ten years with strong future prospects beneath the skin, cosmetic or plastic surgeons seeking advancements in skin tightening, scar management, fat grafting, in addition to proper surgical training and certification are under the top priorities.

On the other hand, it was realized that breast augmentation, tummy tucks, and liposuction are projected to be the most popular cosmetic surgical procedures. Also, regarding minimally invasive surgery, Botox is leading and is anticipated to be in high demand. This is further predicted to be followed by fillers, chemical peels, laser hair removal, dermabrasion, non-invasive fat reduction, and non-surgical skin tightening.

Furthermore, according to the March 2017 press release by the ASPS, it was estimated by the American Cancer Society that in 2017, around 252,710 new cases for invasive breast cancer is projected to be diagnosed in the United States. In the previous year, breast reconstruction accounted for more than 100,000 surgeries. Steady growth was observed on an annual basis accounting for over 30% of breast construction procedural volumes since 2000, in addition, around a 3% increase was noticed since 2015. In addition, a parallel rise of patient-driven requests was also observed by the plastic surgeons for bilateral mastectomy along with immediate breast reconstruction. Hence, this indicates that with ongoing cancer treatments that include mastectomy, there is a strong growth potential for the market to proliferate during the forecast period. At present, there are over 3 million cancer survivors in the USA. Many of them are potential candidates for delayed breast reconstruction, also, there are candidates that require revisions of their previous breast reconstruction, further fueling the market demand over the next five years.

Segmentation:

By Type

Implants

Silicone Implants

Saline Implants

Tissue Expander

By Mastectomy

Unilateral

Bilateral

By End-User

Hospitals

Cosmetology Clinics

Ambulatory Surgery Centers

By Geography

North America

USA

Canada

Mexico

South America

Brazil

Argentina

Others

Europe

UK

Germany

France

Others

Middle East and Africa

UAE

Israel

Saudi Arabia

Others

Asia Pacific

Japan

China

India

Australia

Others

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11.5. RTI Surgical Holdings, Inc.

11.6. Sientra, Inc.

* The list is not exhaustive

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