

Breast Biopsy Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Type (Biopsy Needles, Guidance Systems, Biopsy Tables, Localization Wires, Assay Kits, Liquid Biopsy Instruments, Others), By Procedure (Needle Breast Biopsy, Open Surgical Breast Biopsy, Liquid Breast Biopsy), By Application (Early Cancer Screening, Therapy Selection, Treatment Monitoring, Recurrence Monitoring), By End User (Hospitals & Surgical Centers, Breast Care Centers, Imaging Clinics & Diagnostic Centers), By Region, By Competition

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Abstracts

Global Breast Biopsy Devices Market was valued at USD 0.84 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 6.69% through 2029. Breast biopsy techniques employ medical instruments known as breast biopsy devices. A breast biopsy is a surgical procedure that removes tissue or fluid to be examined and checked for any illnesses. Under microscopes, the excised tissue is analyzed to see whether it contains cancer. Once a patient has a cancer diagnosis, a biopsy is a medical examination to analyze and remove the malignant tissue from the body. To obtain tissue samples for the diagnosis of the condition, a biopsy is used. Skin biopsy, shave biopsy, fine needle aspiration, incision, excision biopsy core, and vacuum-assisted biopsy are only a few of the biopsy procedures used in the diagnosis of malignancies. The main factor driving the growth of the global Breast Biopsy Device

Market is an increase in the incidence of breast cancer. The market is now growing due to the expansion of breast cancer screening programs as well as the surgical acceptance of minimally invasive breast biopsies.

Key Market Drivers

Rising Incidence of Breast Cancer

As the incidence of breast cancer continues to rise, there is a growing need for accurate and timely diagnostic procedures. Breast biopsy is a critical step in confirming the presence of breast cancer and determining its type and stage. This increased demand for breast cancer diagnosis drives the utilization of breast biopsy devices. Public health awareness campaigns and screening programs emphasize the importance of early detection in improving breast cancer outcomes. Mammography and other screening methods often lead to the identification of suspicious breast lesions, which then require biopsy for further evaluation. The rising incidence of breast cancer underscores the need for more frequent screenings and, subsequently, more breast biopsies. Accurate diagnosis is crucial for developing an effective treatment plan. As more cases of breast cancer are diagnosed, the demand for precise and comprehensive information about the tumor, such as its type, size, and genetic characteristics, increases. Breast biopsy devices play a pivotal role in obtaining the tissue samples needed for such detailed analysis. Patients diagnosed with breast cancer often prefer less invasive diagnostic procedures. This preference is particularly strong when dealing with the early stages of cancer. Advances in breast biopsy devices have led to the development of minimally invasive techniques, such as core needle biopsies, which are less painful and have shorter recovery times compared to traditional surgical biopsies. This aligns with patient preferences and further drives the adoption of breast biopsy devices. The rising incidence of breast cancer is not limited to developed countries but is also prevalent in emerging economies. As healthcare infrastructure improves and awareness increases in these regions, there is a growing market for breast biopsy devices. This expansion contributes to the global growth of the market. The growing prevalence of breast cancer has prompted increased research and development investments in the field of breast biopsy devices. Manufacturers are motivated to innovate and develop new technologies that can enhance the accuracy and efficiency of breast biopsy procedures, further fueling market growth.

Growing Awareness and Early Detection

Growing awareness campaigns, education initiatives, and public health efforts have

successfully encouraged women to undergo regular breast cancer screenings. These campaigns emphasize the importance of early detection, leading to an increased number of screenings and mammography tests. When abnormalities or suspicious lesions are detected through these screenings, it often necessitates further evaluation through breast biopsy procedures. The heightened awareness and emphasis on early detection result in a greater demand for breast biopsy devices. Early detection of breast cancer significantly improves treatment outcomes and survival rates. Patients diagnosed at an early stage typically require less aggressive treatments and have a higher chance of successful recovery. Healthcare providers, therefore, prioritize timely diagnosis through biopsy to ensure that patients receive appropriate and timely treatment. This drives the demand for efficient and accurate breast biopsy devices. Many countries have established breast cancer screening programs and guidelines that recommend regular screenings for specific age groups or risk categories. These programs create a consistent and continuous demand for breast biopsy procedures, especially when screening identifies suspicious findings. This demand sustains the market for breast biopsy devices. Not only are patients becoming more aware of the importance of breast cancer screening, but physicians are also increasingly vigilant in recommending screenings for their patients. Physician recommendations play a crucial role in patient compliance with screening guidelines. When abnormal findings occur, physicians rely on breast biopsy devices to confirm or rule out cancer. The emphasis on early detection has driven innovations in breast biopsy device technology. Manufacturers invest in research and development to create devices that are more accurate, less invasive, and quicker, aligning with the goals of early detection. These advancements not only improve patient experiences but also make breast biopsy procedures more accessible, encouraging more individuals to undergo the necessary tests.

Growing demand for Minimally Invasive Procedures

Patients increasingly prefer minimally invasive procedures over traditional surgical approaches due to their many benefits, such as reduced pain, shorter recovery times, and smaller scars. As patient preferences evolve, there is a higher demand for breast biopsy devices that enable minimally invasive techniques. Minimally invasive breast biopsy procedures are associated with lower discomfort and pain during and after the procedure. This improved patient experience encourages more individuals to undergo breast biopsy, leading to a higher overall demand for biopsy devices. Patients are more likely to comply with recommended breast cancer screenings and diagnostic procedures when they know that minimally invasive options are available. This increased compliance leads to earlier detection and diagnosis, driving the utilization of breast

biopsy devices. Minimally invasive procedures typically result in shorter hospital stays and reduced post-operative care requirements, leading to cost savings for healthcare systems and patients. As healthcare stakeholders seek cost-effective solutions, minimally invasive breast biopsy procedures become an attractive option, contributing to market growth. Manufacturers are continually developing and improving minimally invasive breast biopsy devices, incorporating advanced technologies such as ultrasound or stereotactic guidance. These innovations enhance the accuracy and precision of biopsy procedures, making them more appealing to both healthcare providers and patients. Minimally invasive breast biopsy procedures allow patients to return to their normal daily activities more quickly than traditional surgical biopsies. This feature is particularly valuable for individuals with busy lives or those who want to minimize disruptions caused by medical procedures, further boosting the demand for minimally invasive biopsy devices.

Key Market Challenges

Cost Constraints

High costs associated with breast biopsy procedures and devices can limit access to these critical diagnostic services, particularly for uninsured or underinsured patients. When the cost of a biopsy is prohibitive, individuals may delay or forgo necessary screenings, leading to missed diagnoses and later-stage cancer detection. Healthcare facilities and providers may hesitate to invest in expensive breast biopsy devices, especially in regions with budget constraints. This reluctance can slow the adoption of advanced biopsy technologies, keeping healthcare systems reliant on older, potentially less effective methods. Expensive biopsy devices and procedures can strain healthcare budgets and resources. This financial burden may divert resources away from other essential healthcare services, leading to a compromise in overall healthcare quality. Cost constraints can exacerbate healthcare disparities, with patients in lower-income brackets or underserved regions facing greater challenges in accessing breast biopsy services. This can lead to disparities in breast cancer outcomes, with disadvantaged populations experiencing delayed diagnoses and poorer survival rates. High biopsy costs can discourage healthcare providers from participating in breast cancer screening programs, as they may be concerned about the financial implications of follow-up biopsies. This, in turn, can reduce the effectiveness of population-wide screening efforts. Patients who cannot afford timely breast biopsies may experience delayed diagnosis and treatment initiation. Delayed diagnosis can result in cancer progression, necessitating more extensive and expensive treatments, ultimately increasing the overall cost of care.

Reimbursement Issues

Inconsistent or inadequate reimbursement policies can result in higher out-of-pocket costs for patients undergoing breast biopsy procedures. When patients are required to bear a significant financial burden, they may be less likely to opt for these procedures, which can lead to delayed diagnoses and treatment. Healthcare providers and facilities may be hesitant to offer breast biopsy services if reimbursement rates do not cover the cost of the procedure. This reluctance can reduce the availability of biopsy services and limit patient access, particularly in underserved areas. Inefficient or delayed reimbursement processes can strain the finances of healthcare practices and facilities. When payments are delayed or insufficient, it can create financial instability, which may, in turn, affect their ability to invest in advanced biopsy devices or maintain high-quality care. Inadequate reimbursement for newer, more advanced breast biopsy devices may discourage healthcare facilities from adopting these technologies. Providers may opt for lower-cost, older biopsy methods that are more likely to be reimbursed at acceptable rates. Stricter reimbursement requirements and delays in obtaining reimbursement approvals can create barriers for manufacturers trying to introduce new breast biopsy devices to the market. This can slow down the innovation and development of advanced technologies. Reimbursement policies can vary significantly by region or country. This can result in regional disparities in access to breast biopsy procedures, with patients in certain areas having better access to advanced technologies and reimbursement rates than others.

Key Market Trends

3D Mammography Integration

3D mammography provides clearer and more detailed images of breast tissue, allowing healthcare providers to better identify and localize suspicious lesions. This improved precision reduces the need for multiple biopsy attempts, streamlining the diagnostic process. The combination of 3D mammography with breast biopsy procedures increases the accuracy of lesion targeting. This accuracy minimizes the chances of missing a malignancy or obtaining inadequate tissue samples, leading to more reliable biopsy results and reduced false negatives. Enhanced accuracy means that biopsy procedures can be quicker and require fewer tissue samples, resulting in reduced patient discomfort and anxiety. Patients are more likely to comply with recommended breast biopsy procedures when they know the process is efficient and minimally invasive. Radiologists and healthcare providers can have greater confidence in the

diagnostic results when 3D mammography is integrated into biopsy procedures. This confidence is vital for effective treatment planning and patient counseling. By improving lesion localization and accuracy, 3D mammography integration can reduce the need for additional diagnostic procedures or surgeries. This not only saves time and resources but also reduces patient stress and inconvenience. Healthcare facilities benefit from more efficient workflows when using integrated 3D mammography systems. Quicker procedures and more accurate results can lead to increased patient throughput and improved utilization of healthcare resources.

Artificial Intelligence (AI) Assistance

AI algorithms can analyze mammograms and other imaging data with incredible speed and accuracy. By assisting radiologists and clinicians in interpreting images and identifying suspicious lesions, AI can significantly enhance the accuracy of breast cancer diagnosis. This increased accuracy is a major driver for the adoption of AI-assisted breast biopsy devices. AI can automate repetitive tasks, such as lesion detection and segmentation, reducing the workload on healthcare professionals. This leads to more efficient workflow processes, allowing providers to serve more patients and potentially reducing wait times for biopsies. The resulting workflow efficiency can be a compelling factor for healthcare facilities considering the adoption of AI-powered breast biopsy devices. AI algorithms can help reduce both false positives and false negatives in breast cancer diagnosis. Fewer false positives mean fewer unnecessary biopsies, lowering the cost of healthcare, while fewer false negatives enhance patient safety by ensuring that cancers are not missed during diagnosis. AI can analyze patient data and pathology results to help tailor treatment plans for individuals based on their unique characteristics. This trend is driving the development of breast biopsy devices that can collect tissue samples suitable for genomic analysis. Personalized medicine is considered the future of cancer treatment, and AI plays a pivotal role in making it a reality. AI-assisted breast biopsy devices can expedite the diagnostic process. Automated image analysis and data interpretation can reduce the time it takes to make a diagnosis, allowing patients to receive timely treatment when needed. This is particularly critical in cases where rapid intervention is essential. AI-powered breast biopsy devices can facilitate telemedicine and remote consultations. Radiologists and specialists can review images and provide guidance from remote locations, expanding access to expert care and reducing geographical barriers to diagnosis and treatment.

Segmental Insights

Type Insights

Based on the Type, the biopsy needles segment is anticipated to witness substantial market growth throughout the forecast period. Biopsy needles must accurately target and extract tissue samples from breast lesions. Needles that can consistently achieve high levels of accuracy and precision in obtaining tissue samples contribute to the reliability of biopsy procedures. Healthcare providers and patients alike seek needles that minimize the risk of sampling errors and improve diagnostic accuracy. The demand for minimally invasive breast biopsy procedures, which are less painful and result in shorter recovery times, has been steadily increasing. Biopsy needles that facilitate these less invasive techniques, such as core needle biopsy or vacuum-assisted biopsy, are driving market growth. Patients often prefer these methods, which can lead to higher utilization of breast biopsy services. Biopsy needles that prioritize patient comfort and safety are well-received in the market. Design features such as smaller gauge sizes, smoother insertion, and reduced tissue trauma can lead to a better patient experience. When patients have positive experiences, they are more likely to comply with recommended screenings and biopsy procedures. Biopsy needles must be compatible with various imaging technologies, such as ultrasound, mammography, or MRI. Needles that enable accurate lesion localization and targeting under imaging guidance enhance the efficiency of breast biopsy procedures, reducing the chances of sampling errors and the need for additional interventions. Continuous innovations in biopsy needle design, including advancements in needle materials and configurations, can lead to improved performance and diagnostic accuracy. Manufacturers invest in research and development to create needles that optimize tissue retrieval while minimizing patient discomfort. Biopsy needles that incorporate automation, such as automated sample collection or specimen retrieval, can enhance the efficiency of the biopsy procedure. Automation reduces the time required for each procedure, allowing healthcare providers to serve more patients and potentially lower healthcare costs.

Procedure Insights

Based on the Procedure segment, the Procedure segment has been the dominant force in the market. Liquid breast biopsy offers a non-invasive alternative to traditional tissue biopsy procedures. Instead of extracting tissue samples through a needle or surgical biopsy, liquid biopsies detect cancer-related biomarkers, such as circulating tumor DNA (ctDNA) or circulating tumor cells (CTCs), in a patient's blood or other bodily fluids. This non-invasive approach can encourage more individuals to undergo breast cancer screening, potentially increasing the demand for biopsy services. Liquid biopsy techniques can detect breast cancer at an earlier stage, often before the formation of palpable tumors. Early detection is critical for improved treatment outcomes and

reduced healthcare costs associated with advanced-stage cancer treatment. The ability to detect cancer markers in blood samples can lead to more timely interventions and lower morbidity rates. Liquid biopsy is not limited to initial cancer diagnosis; it can also be used for monitoring cancer treatment effectiveness and detecting cancer recurrence. This ongoing monitoring can lead to more personalized treatment plans and better management of breast cancer, ultimately driving demand for liquid biopsy technologies. Liquid biopsy procedures are generally less invasive and painful than traditional tissue biopsies. This can enhance the patient experience and reduce reluctance to undergo diagnostic procedures, ultimately increasing the utilization of breast biopsy services. Liquid biopsy can provide valuable information about breast cancer in cases where traditional biopsy methods are challenging, such as in high-risk populations, individuals with dense breast tissue, or lesions located in difficult-to-reach areas. Liquid biopsy can complement traditional biopsy techniques in such cases. Liquid biopsy enables the assessment of genetic and molecular changes in a patient's cancer cells, which can inform personalized treatment plans. Tailoring treatments to the specific characteristics of a patient's tumor is a growing trend in cancer care and can lead to more effective therapies.

Regional Insights

North America, specifically the Breast Biopsy Devices Market, dominated the market in 2023, primarily due to North America boasts a highly advanced healthcare infrastructure, with state-of-the-art medical facilities, research institutions, and skilled healthcare professionals. This infrastructure supports the adoption of the latest breast biopsy devices and technologies. North America has a relatively high incidence of breast cancer, which drives the demand for breast biopsy procedures and devices. The awareness of breast cancer screening and early detection is strong in the region, contributing to a steady market demand. The United States and Canada are home to many leading medical device manufacturers and pharmaceutical companies. These entities invest heavily in research and development, leading to the creation of cutting-edge breast biopsy devices and technologies that are then introduced to the global market. Regulatory bodies in North America, such as the U.S. Food and Drug Administration (FDA) and Health Canada, are known for their rigorous but supportive regulatory processes. When breast biopsy devices receive regulatory approval in North America, it often signals their quality and safety to other global markets, boosting their adoption internationally. North America is a hub for clinical trials and research in the field of breast cancer and breast biopsy technologies. These trials often involve the use of the latest devices, contributing to the advancement and validation of new technologies. Patient advocacy groups in North America actively promote breast cancer

awareness, early detection, and access to the latest diagnostic and treatment options. This advocacy encourages individuals to undergo breast biopsy procedures when necessary.

Key Market Players

Hologic Inc.

Danaher Corporation.

Becton, Dickinson and Company.

Argon Medical Devices.

Guardant Health Inc.

Merit Medical Systems.

Neogenomics Laboratories

Sysmex Inostics.

Sterylab S.R.L.

Bio Rad Laboratories Inc.

Report Scope:

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

Breast Biopsy Devices Market, By Type:

Biopsy Needles

Guidance Systems

Biopsy Tables

Localization Wires

Assay Kits

Liquid Biopsy Instruments

Others

Breast Biopsy Devices Market, By Procedure:

Needle Breast Biopsy

Open Surgical Breast Biopsy

Liquid Breast Biopsy

Breast Biopsy Devices Market, By Application:

Early Cancer Screening

Therapy Selection

Treatment Monitoring

Recurrence Monitoring

Breast Biopsy Devices Market, By End User:

Hospitals & Surgical Centers

Breast Care Centers

Imaging Clinics & Diagnostic Centers

Breast 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

Competitive Landscape

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

Available Customizations:

Global Breast 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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15.1.3. Recent Developments

15.1.4. Financials (As Reported)

- 15.1.5. Key Personnel
- 15.1.6. SWOT Analysis
- 15.2. Danaher Corporation.
- 15.3. Becton, Dickinson and Company.
- 15.4. Argon Medical Devices.
- 15.5. Guardant Health Inc.
- 15.6. Merit Medical Systems.
- 15.7. Neogenomics Laboratories
- 15.8. Sysmex Inostics.
- 15.9. Sterylab S.R.L.
- 15.10. Bio Rad Laboratories Inc.

16. STRATEGIC RECOMMENDATIONS

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