

Sentinel Node Biopsy Market Size, Share and Growth Outlook 2026: By Product Type, By Technology, By Indication, By End-User, Companies to 2034

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Abstracts

The global Sentinel Node Biopsy Market size is forecast to increase from \$897.52 Million in 2026 to \$1591.2 Million in 2034 at a CAGR of 7.42% between 2026 and 2034.

The Sentinel Node Biopsy market report provides detailed analysis and outlook of Sentinel Node Biopsy segments including By Product Type (Gamma Detection Systems, Magnetic Tracer and Detection Systems, Radiotracers, Fluorescent and Dye Tracers, Consumables and Accessories), By Technology (Radioisotope + Blue Dye Technique, Dual-Tracer Technique, Near-Infrared Fluorescence, Magnetic Tracer Technique), By Indication (Breast Cancer, Melanoma, Thyroid Carcinoma, Vulvar Cancer, Non-Melanoma Skin Cancer, Other Cancers), By End-User (Hospitals and Surgical Centers, Ambulatory Surgical Centers (ASCs), Cancer Research Institutes, Specialty Clinics) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Sentinel Node Biopsy Industry Overview

Sentinel Node Biopsy Is Evolving from a Diagnostic Procedure into a Critical Component of Precision Surgical Oncology

The sentinel node biopsy industry is experiencing substantial transformation as advances in surgical oncology, imaging technologies, and clinical evidence continue to expand the role of sentinel lymph node evaluation in cancer management. Traditionally utilized as a staging procedure, sentinel node biopsy is increasingly recognized as a clinically significant intervention capable of improving patient outcomes while reducing

unnecessary surgical morbidity. The growing adoption of minimally invasive procedures, real-time imaging technologies, and precision-guided lymphatic mapping techniques is reshaping surgical workflows across melanoma, breast cancer, and other solid tumor indications. Healthcare providers are simultaneously seeking technologies that reduce procedural complexity, optimize operating room efficiency, and minimize patient exposure to radiation-based diagnostic systems.

Clinical Evidence Is Expanding the Therapeutic Importance of Sentinel Node Procedures

Recent clinical findings have significantly strengthened the role of sentinel node biopsy within evidence-based oncology practice. Emerging data suggest that sentinel node assessment may provide benefits beyond disease staging, influencing long-term treatment outcomes and survival. Supporting this shift, a comprehensive systematic review and meta-analysis published in *The Lancet Oncology* demonstrated that performing sentinel node biopsy significantly reduces long-term mortality risk in patients with cutaneous melanoma. The findings established that sentinel node biopsy not only improves disease stratification but also provides absolute survival advantages while reducing the need for extensive regional lymph node dissections and associated treatment-related toxicities. Such evidence is expected to reinforce clinical guideline adoption and expand procedural utilization globally.

Radiation-Free and Real-Time Imaging Technologies Are Transforming Sentinel Node Mapping

Technological innovation remains a major growth driver within the sentinel node biopsy industry, particularly through the development of radiation-free and image-guided lymphatic mapping platforms. Hospitals and cancer centers are increasingly adopting alternatives to traditional Technetium-99m-based procedures to improve workflow efficiency and reduce operational dependence on nuclear medicine infrastructure. Clinical integration of sentinel lymph node biopsy procedures utilizing indocyanine green (ICG) fluorescence imaging combined with standard dyes has enabled real-time visualization of lymphatic pathways using near-infrared (NIR) imaging systems. In parallel, Hologic and Endomag have reported widespread clinical adoption of the radiation-free Magtrace® magnetic lymphatic tracer and Sentimag® detection platform, which utilize iron-oxide nanoparticles for lymphatic mapping. This technology enables tracer administration weeks before surgery, providing greater scheduling flexibility while reducing hospital radiation logistics burdens. These advances are accelerating the transition toward safer, more efficient, and precision-oriented sentinel node biopsy

procedures across modern surgical oncology practice.

Sentinel Node Biopsy Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Sentinel Node Biopsy market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Becton, Dickinson and Company, Hologic, Inc. , Cardinal Health, Inc., GE HealthCare Technologies Inc., Medtronic plc, Stryker Corporation, Curium Pharma, Siemens Healthineers, Navidea Biopharmaceuticals, Inc., Devicor Medical Products, Inc. (Mammotome). The Sentinel Node Biopsy market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Sentinel Node Biopsy industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Sentinel Node Biopsy Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Sentinel Node Biopsy companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Sentinel Node Biopsy markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and long-term outlook

- Recent industry developments and news including mergers, acquisitions,

product launches, expansions, and company announcements

Sentinel Node Biopsy Market Competitive Benchmarking and Company Analysis

Leading companies in Sentinel Node Biopsy industry include- Becton, Dickinson and Company, Hologic, Inc. , Cardinal Health, Inc., GE HealthCare Technologies Inc., Medtronic plc, Stryker Corporation, Curium Pharma, Siemens Healthineers, Navidea Biopharmaceuticals, Inc., Devicor Medical Products, Inc. (Mammotome). The Sentinel Node Biopsy market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Sentinel Node Biopsy Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Sentinel Node Biopsy market remains one of the strongest-performing segments in the country.

The US Sentinel Node Biopsy Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Sentinel Node Biopsy market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Sentinel Node Biopsy industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Sentinel Node Biopsy markets

Canada's strong Sentinel Node Biopsy sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Sentinel Node Biopsy market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Sentinel Node Biopsy Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Sentinel Node Biopsy market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Sentinel Node Biopsy population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Sentinel Node Biopsy industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Sentinel Node Biopsy market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Sentinel Node Biopsy sales through 2034

France Sentinel Node Biopsy companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Sentinel Node Biopsy Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Sentinel Node Biopsy distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Sentinel Node Biopsy Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Sentinel Node Biopsy market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Sentinel Node Biopsy industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Sentinel Node Biopsy industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation,

long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Sentinel Node Biopsy Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Sentinel Node Biopsy market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Sentinel Node Biopsy market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Sentinel Node Biopsy Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Sentinel Node Biopsy Market Segmentation

By Product Type

Gamma Detection Systems

Magnetic Tracer and Detection Systems

Radiotracers

Fluorescent and Dye Tracers

Consumables and Accessories

By Technology

Radioisotope + Blue Dye Technique

Dual-Tracer Technique

Near-Infrared Fluorescence

Magnetic Tracer Technique

By Indication

Breast Cancer

Melanoma

Thyroid Carcinoma

Vulvar Cancer

Non-Melanoma Skin Cancer

Other Cancers

By End-User

Hospitals and Surgical Centers

Ambulatory Surgical Centers (ASCs)

Cancer Research Institutes

Specialty Clinics

Leading Companies in Sentinel Node Biopsy Industry (2026)

Becton, Dickinson and Company

Hologic, Inc.

Cardinal Health, Inc.

GE HealthCare Technologies Inc.

Medtronic plc

Stryker Corporation

Curium Pharma

Siemens Healthineers

Navidea Biopharmaceuticals, Inc.

Devicor Medical Products, Inc. (Mammotome)

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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Magnetic Tracer and Detection Systems

Radiotracers
Fluorescent and Dye Tracers
Consumables and Accessories
By Technology
Radioisotope + Blue Dye Technique
Dual-Tracer Technique
Near-Infrared Fluorescence
Magnetic Tracer Technique
By Indication
Breast Cancer
Melanoma
Thyroid Carcinoma
Vulvar Cancer
Non-Melanoma Skin Cancer
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GE HealthCare Technologies Inc.

Medtronic plc

Stryker Corporation

Curium Pharma

Siemens Healthineers

Navidea Biopharmaceuticals, Inc.

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