

Breast Implant Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 115 pages | Mordor Intelligence

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Report description:

The breast implant market was valued at USD 1,660.38 million in the base year and is expected to register a CAGR of 7.62% during the forecast period.

The COVID-19 pandemic had a short-term impact on the breast implant market, primarily in the initial lockdown phase and other travel restrictions to curb the spread of infection. Due to this, ongoing and scheduled surgical procedures were delayed or canceled, negatively impacting the market. However, the interest and demand for beauty procedures increased during the pandemic among women in the United States, including implants and augmentation. For instance, according to the April 2021 survey report by the American Society of Plastic Surgeons, 11% of the surveyed women were more inclined toward cosmetic surgery or non-surgical procedures than before the pandemic. Therefore, the market is expected to recover soon from the impact of the pandemic and grow in the future.

The rising prevalence of breast cancer worldwide is one of the significant factors for market growth. According to GLOBOCAN 2020, breast cancer surpassed lung cancer and became the most diagnosed cancer worldwide. According to World Health Organization, in 2020, around 2.3 million women were diagnosed with breast cancer globally. About 7.8 million women have been diagnosed with breast cancer over the last five years. While in Asian women, breast cancer prevalence was so high that it accounted for 22.9% of the total cancer cases in women in 2020. Another factor expected to boost the growth of the market studied is women's increasing inclination and awareness toward breast augmentation and reconstruction procedures for beauty enhancement. For example, per the 2020 International Society for Aesthetic Plastic Surgeons (ISAPS) statistics, there were about 193,073 breast augmentation procedures in the United States in 2020, which was more than any other performed aesthetic surgery.

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Additionally, market players in the area are continuously working toward better and more efficient solutions and evolving the life of available products through awareness campaigns regarding breast implants, product launches, collaborations, and mergers and acquisitions, which will complement the market growth. For instance, in June 2020, Allergan Aesthetics, a part of AbbVie Inc., announced the initiation of a digital campaign to improve device tracking and identification and increase its reach to patients having Allergan breast implants called BIO CELL and to inform women about the risks of breast implant-associated anaplastic large cell lymphoma (BIA-ALCL). Such introduction of advanced breast implants is expected to contribute to the market's growth.

Thus, the factors mentioned earlier are expected to contribute to the growth of the market studied over the forecast period. However, the post-surgery complications and risks associated with the breast implant, along with the high cost, are the major restraining factors for the growth of the breast implant market.

Breast Implant Market Trends

Silicone Implant is Expected to Hold Major Share in the Market over Other Types during the Forecast Period

The silicone implant segment is expected to dominate the market over the forecast period owing to rising demand for silicone implants. These implants are silicone shells filled with a plastic gel (silicone) that resemble human fat because of viscosity and are used for breast augmentation or reconstruction. Compared to other types of implants, they feel like natural breast tissue, which is the primary reason they are preferred by most people seeking implants compared to different kinds. Silicone breast implants are approved for breast augmentation in women 22 or older and for breast reconstruction in women of any age by the United States Food and Drug Administration.

New technological advancements and improvements in the existing products of silicone breast implants for breast augmentation and reconstruction are expected to boost the market's growth. For instance, in May 2021, GC Aesthetics Inc., a silicone breast implant manufacturer, announced the launch of a next-generation implant called PERLE, a smooth breast implant with a proprietary surface technology called BioQ. Thus, due to the high demand for silicone-based breast implants, the market is expected to grow during the forecast period.

North America is Expected to Dominate the Market Over the Forecast Period

North America holds a significant share of the breast implant market. It is expected to show a similar trend over the forecast period. This is mainly due to the high demand for breast augmentation surgeries due to several regional entertainment industries and self-awareness among women. In North America, the United States is expected to hold the largest market for breast implants in the region during the forecast period.

The demand for cosmetic surgeries and procedures in the United States is very high among women, which is one of the significant factors for market growth. For instance, according to the 2020 American Society of Plastic Surgeons report, breast augmentation was one of the top five cosmetic surgical procedures in 2020 in the United States. Moreover, the total number was 193,073 breast augmentation procedures in 2020. In addition, the increasing prevalence of breast cancer in North America will also complement the market's growth. As per the GLOBOCAN 2020 report, new breast cancer cases in the United States, Canada, and Mexico were 253,465, 28,026, and 29,929, respectively, in 2020.

Additionally, the rise in product approvals by various regulatory organizations is expected to contribute to the market's growth. For instance, in January 2022, Mentor Worldwide LLC received the United States Food and Drug Administration for the MENTOR Memory Gel BOOST, a breast implant for breast augmentation in women.

Therefore, North America is expected to hold a significant market share in the breast implant market during the forecast period.

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Breast Implant Market Competitor Analysis

The breast implant market is moderately competitive due to the presence of small and large market players who offer a range of implants for breast augmentation, reconstruction, or other cosmetic procedures and are actively involved in enhancing their offerings in the market. Some market players are AbbVie Inc. (Allergan PLC), Establishment Labs SA, GC Aesthetics, Groupe Sebbin SAS, Laboratories Arion, Johnson & Johnson (Mentor Worldwide LLC), and Polytech Health & Aesthetics GmbH.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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