

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

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Report description:

The breast reconstruction market is projected to register a CAGR of 7.1% over the forecast period.

The COVID-19 pandemic had a short-term impact on the breast implant market, primarily during the initial phase of the pandemic. Due to restrictions and lockdown, the ongoing and scheduled surgical procedures were delayed or canceled, hindering the growth of the breast implant market. However, the interest and growing awareness regarding physical appearance increased during the COVID-19 pandemic among women in the United States, including breast implants and augmentation. For instance, according to the April 2021 survey report by the ASPS, 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 COVID-19 pandemic and is expected to grow.

The major factor driving the growth of the market studied is the increasing incidence of breast cancer. According to GLOBOCAN 2020, breast cancer surpassed lung cancer and became the most diagnosed cancer worldwide. According to the WHO, 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. In Asian women, breast cancer prevalence was high, accounting for 22.9% of the total cancer cases in women in 2020. Increasing awareness about the safety of breast reconstruction options is reassuring women undergoing mastectomy and other breast cancer surgeries to choose the reconstruction process.

The increasing products of innovative products are boosting the market's growth. For instance, in October 2020, GC Aesthetics launched Perle, a novel round breast implant. It is developed with reverse surface technology allowing for reduced inflammation and easier placement and incision. Such introduction of advanced breast implants is expected to contribute to the growth of the market.

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Thus, factors such as the increasing incidence of breast cancer, increasing awareness among the global population, and innovative product launches are expected to drive the growth of the market studied. However, the high cost of breast reconstruction procedures is the major factor restraining the growth of the market.

Breast Reconstruction Market Trends

Breast Implants Holds the Largest Share in the Breast Reconstruction Market Over the Forecast Period

The usage of breast implants in breast reconstruction surgeries accounted for a significant share of the global market, and this is expected to remain a prominent trend in the breast reconstruction market in the forecast period.

Increasing awareness and inclination among women across the world toward breast augmentation and reconstruction procedures for beauty enhancement is another factor expected to boost the growth of the market studied. According to 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.

The market players in the area are continuously working toward better and more efficient solutions and evolving the life of available products through new product launches, collaborations, and mergers and acquisitions, which will also complement the growth of the breast implant segment. For instance, in May 2021, GC Aesthetics Inc. launched a next-generation breast implant called PERLE, a smooth breast implant with a proprietary surface technology called BioQ.

Thus, considering all the above-mentioned factors, such as increasing awareness and inclination among women worldwide toward breast augmentation and reconstruction procedures and new product launches, the segment studied is expected to witness high growth over the forecast period.

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

North America is expected to dominate the market studied during the forecast period due to the high incidence of breast cancer, increasing breast augmentation procedures, and established healthcare infrastructure.

For instance, according to the 2020 report of the American Society of Plastic Surgeons, breast augmentation was one of the top five cosmetic surgical procedures in 2020 in the United States. The increasing prevalence of breast cancer in this region is anticipated to boost the growth of the breast implant market in the region. According to the GLOBOCAN 2020 report, the new breast cancer cases in the United States, Canada, and Mexico were 253,465, 28,026, and 29,929, respectively, in 2020. Therefore, North America is expected to hold a significant market share in the breast implant market during the forecast period. Beneficial government initiatives and increased research partnerships are expected to drive the market's growth.

The rising product approvals are expected to contribute to the growth of the market in this region. For instance, in March 2022, Sientra Inc. received approval from Health Canada to market the company's line of smooth surface, High-Strength Cohesive (HSC and HSC+) silicone gel breast implants in Canada. The rising prevalence of breast cancer and the increasing focus of market players in this region are expected to boost the growth of the breast reconstruction market in North America.

Breast Reconstruction Market Competitor Analysis

The breast reconstruction market is moderately competitive and consists of several major players. Some of the companies which are currently dominating the market are Allergan, Sientra Inc., Ideal Implant Incorporated, Johnson & Johnson, Establishment Labs

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