

Breast Lesion Localization Methods - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Breast Lesion Localization Methods Market is expected to register a CAGR of 11.2% during the forecast period.

The COVID-19 pandemic severely impacted the market studied, as footfall in hospitals, clinics, and diagnostics centers decreased significantly due to the pandemic-resultant lockdown and the suspension of non-urgent procedures. As per a research study published in Preventive Medicines in October 2021, global breast cancer screening and participation were impacted by the pandemic. Many nations, such as Canada, the Netherlands, Germany, Italy, the United Kingdom, and Australia, halted their breast screening programs to prevent the contamination and transmission of coronavirus among the population. Thus, the delayed screening and diagnostic procedures impacted the market growth during the pandemic. However, with the released COVID-19 restrictions, reopened oncology care units and hospitals, as well as an increased number of breast cancer surgical procedures and growing awareness programs by the government regarding breast cancer screening and treatment, the studied market is expected to regain its growth over the next 3-4 years.

Other factors, such as the rising prevalence of breast cancer and breast cancer surgeries, technological advancements in breast lesion localization, and increasing awareness and need for early detection of breast cancer among the population, are boosting the market growth.

The localization of breast lesions has emerged as a common procedure with advancements in the surgical and imaging techniques used to identify and treat breast injuries or breast cancer over time. The increasing burden of breast cancer worldwide is expected to drive the market. According to GLOBOCAN 2020 report, about 3,025,471 new breast cancer cases are expected to be diagnosed by 2040. The anticipated increase in the number of people who have breast cancer raises the demand for breast lesion localization procedures, propelling the market growth.

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The increasing government initiatives to raise awareness regarding breast cancer among the population are also expected to increase the demand for breast cancer diagnosis and treatment. In October 2021, Wefra Life and Pink Ribbon Germany (a non-profit organization) launched a Breast Cancer Affects Us All campaign to raise awareness about breast cancer and promote breast care applications among the population. Breast Care is a free multilingual app that provides multimedia content in seven different languages that cover all pertinent aspects of early breast cancer detection and prevention.

Furthermore, the rising technological advancements in breast lesion localization methods are creating opportunities for companies, along with increasing the availability of advanced devices for conducting procedures. In May 2021, the United States FDA approved MOLLI Surgical's new wire-free localization technology for breast cancer surgery that allows radiologists to mark lesions rapidly and precisely and helps surgeons locate and remove lesions efficiently. This new platform includes an implantable marker, detection wand, and visualization tablet, which help improve tumor localization.

Therefore, factors such as the increasing burden of breast cancer, rising government initiatives, and approval of products are expected to grow over the forecast period. However, factors such as strict regulatory guidelines and high costs associated with breast lesion localization methods are expected to hinder the market's growth over the forecast period.

Breast Lesion Localization Methods Market Trends

Wire Localization Segment Expected to Hold a Significant Market Share

The wire localization segment is expected to witness significant growth in the breast lesion localization methods market over the forecast period owing to factors such as the rising prevalence of breast cancer among the population, growing technologically advanced products, and rising product launches.

Additionally, the advantages offered by the wire localization method, such as being less expensive, more accurate, and more effective than other breast lesion localization techniques, are also expected to increase its adoption during breast cancer treatment. This factor is also expected to impact the growth of the segment positively.

The wire localization method is the most widely used procedure for locating lumps or abnormalities in the breast. This procedure involves using a fine wire to determine the lump's or abnormality's exact location. It is also known as the fine-wire or needle localization method. As per an article published in the Journal of Personalized Medicine in February 2021, it has been observed that wire localization procedures can be performed under different kinds of image guidance (mammographic, sonographic, and magnetic resonance imaging). This procedure is the most common technique for non-palpable breast lesions, with clean margins reported between 70.8% and 87.4%. Such research is expected to increase its adoption for treating breast cancer among patients, thereby boosting segment growth.

The growing burden of breast cancer, an increasing number of breast surgeries, and the wide adoption of the wire localization method in diagnostic and treatment procedures are major growth factors for the wire localization segment. According to an article published in the Breast Cancer Research and Treatment in September 2022, in women aged 60 years and above, the prevalence of breast cancer in Germany was 6.8% in women above 175 cm in height and 12.2% in women with a height of 171-175 cm. The high burden of breast cancer cases increases the demand for early detection and effective treatment, which is further anticipated to fuel the segment's growth.

Furthermore, the companies' rising focus on adopting key strategies to enter the market contributes to market growth. For instance, in January 2021, Hologic, Inc. acquired Somatex Medical Technologies for USD 64 million. This acquisition assists the company in providing a broad suite of innovative breast health solutions and expanding its breast marker portfolio with biopsy site

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markers and localization technologies. Furthermore, with this acquisition, the company intends to boost its sales presence in Europe by growing its direct channel in Germany and its regional and global distributor partner network.

Thus, the studied segment is anticipated to grow over the forecast period due to the aforementioned factors, such as the high prevalence of breast cancer among women and the increasing adoption of wire localization methods.

North America Expected to Dominate the Market

North America held a significant share of the breast lesion localization methods market in the past few years and is expected to show a similar trend over the forecast period. This is primarily due to the high burden of breast cancer cases coupled with robust healthcare infrastructure and increasing awareness about breast cancer.

In North America, the United States is expected to hold a significant share during the forecast period in the market studied due to the high prevalence and incidence of breast cancer, robust healthcare infrastructure, and better reimbursement scenarios. The 2022 statistics published by BCRF expected about 287,850 new cases of breast cancer to be diagnosed in women in the United States in 2022. As per the same source, in the United States, the average risk of women developing breast cancer at some point in their lives is 13%. In recent years, the incidence rate of breast cancer has increased by 0.5% per year in the United States. Additionally, per 2022 statistics published by the Canadian Cancer Society, about 28,600 Canadian women are expected to be diagnosed with breast cancer in 2022. Thus, the anticipated increase in breast cancer cases fuels the demand for diagnostics and surgical procedures for treating breast cancer and drives the growth in the breast lesion localization methods market over the years.

Furthermore, the rising product approvals in the region increase the availability of localization devices in the market, which is anticipated to boost market growth over the forecast period. For instance, in July 2022, Merit Medical System enrolled the first patient in a post-market, observational study to demonstrate the benefits of SCOUT, a wireless, radar-guided localization system for marking breast tumors, biopsy sites, and lymph nodes.

Thus, the studied market is expected to grow over the forecast period due to the aforementioned factors, such as the high burden of breast cancer and increasing product approvals in the region.

Breast Lesion Localization Methods Industry Overview

The breast lesion localization methods market is consolidated and consists of a few major players. In terms of share, a few of the major players are currently dominating the market. Some of the players in the market studied are Becton, Dickinson and Company, Hologic Inc., Cook Medical, Merit Medical, and STERYLABS, among others.

Additional Benefits:

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

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