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CASUAL GAMING TO ESPORTS

India's Booming
Online Gaming Industry

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MESSAGE
From the
CHAIRMAN

Karan Rathore

The nation is home to a multitude of passionate and innovative minds, fostering an environment ripe for creativity and technological advancements.

Dear Readers,

As we commemorate another year of gaming evolution and celebrate our love for this thriving industry, it is with great pleasure that I delve into a topic close to every gamer's heart—the burgeoning gaming export market in India.

The Indian gaming landscape has undergone a remarkable transformation, evolving from a niche interest to a dynamic sector with vast potential. The gaming export market in India has witnessed exponential growth, poised to soar to new heights in the global arena. With a diverse talent pool and a burgeoning tech-savvy population, India stands at the precipice of becoming a key player in the international gaming market.

Moreover, the potential of game developers in India is nothing short of extraordinary. The nation is home to a multitude of passionate and innovative minds, fostering an environment ripe for creativity and technological advancements. Indian game developers have showcased their prowess by creating immersive, culturally rich gaming experiences that resonate with audiences worldwide.

The confluence of technological advancements, a burgeoning market, and a talent pool brimming with creativity positions India as a force to be reckoned with in the gaming industry. As we look ahead, the trajectory of the gaming export market in India seems poised for unprecedented growth and success.

With best regards

Karan Rathore
Chairman

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OVERVIEW OF SERVICES OFFERED BY SEPC

TRADE
INTELLIGENCE

EXPORT
DEVELOPMENT

EXPORT
PROMOTION

ENABLING
BUSINESS ENVIRONMENT

Services Export Promotion Council set up in 2006 by Ministry of Commerce & Industry, Government of India is an apex trade body to promote exports of services from India.

Key role in Foreign Trade Policy, Export Strategy formulation by Department of Commerce and related Govt Departments.

Interface between Services Sector and Government

Provides inputs on Trade Negotiations

Represents Services Sector in various Joint Trade Committees, Joint Business Councils and Joint Working Groups of Government of India to facilitate export.

Creates Business opportunities in global market place for services exporters

Providing commercially useful information and assistance to members in increasing exports.

Organising visits of delegation of its members abroad to explore overseas market opportunities.

Organising participation of Services exporters in specialised International Trade Fairs.

Dissemination of government notification, orders, information on trade and other relevant information to members.

Facilitates execution of Government Schemes like SEIS.

Services Covered under SEPC

In order to enhance the competitiveness of services exports and enable services industry to generate employment, the Union Cabinet chaired by Honourable Prime Minister Shri Narendra Modi in 2018 identified 12 Champion Services Sector.

The following table provides the mapping of identified Champion Services vis-a vis the services covered under SEPC and BPM6 classification. Sixth edition of the Balance of Payments and International Investment Position Manual (BPM6) is developed by IMF in collaboration with compilers and other interested parties worldwide and used by most of the countries to record and report services trade data.

S.N.	Services covered under SEPC	Champion Services	BPM6 Classification
1	Accounting/Auditing and Bookkeeping Services	Accounting and Finance Services	Other business services
2	Consultancy Services	-	
3	Legal Services	Legal services	
4	Architectural Services and related services	Construction and related Engineering services	
5	Environmental services	Environmental services	
6	Marketing Research and Public Opinion Polling Services/ Management services	-	
7	Advertising Services	-	
8	Printing and Publishing services	-	
9	Other services (IT & ITES, Communication Services)	IT & ITES, Communication services	Telecommunications, computer, and information services
10	Hotel and Tourism Related Services	Tourism and Hospitality Services	Travel
11	Education Services	Education services	
12	Healthcare services including services by nurses, physiotherapist and paramedical personnel	Medical Value Travel Services	
13	Maritime Transport Services	Transport and Logistics services	Transport
14	Distribution Services		
15	Other services (Financial Services)	Financial Services	Financial services
			Insurance and pension services
16	Entertainment services including Audio-visual services	Audio-visual services	Personal, cultural, and recreational services
17	Other Services	-	Charges for the use of intellectual property n.i.e.
		-	Government goods and services n.i.e.
		-	Manufacturing services on physical inputs owned by others
		-	Maintenance and repair services n.i.e.
		Construction and related Engineering services	Construction
			Services not allocated

Introduction

The roots of online gaming can be traced back to the early days when computer was introduced. Later with advent of internet, online multiplayer games came as a treat for the gamers. Further, as internet infrastructure improved, gaming entered a new era, with multiplayer functionality becoming a standard feature in many games.

With billions of players engaged across various platforms, the online gaming industry has become a financial powerhouse. According to a report by PwC, the global online gaming market was valued at $214 bn in 2021, and is expected to be around $321 bn in 2026 (Fig 1). The growth is fuelled by the increasing accessibility of gaming platforms, affordable high-speed internet, and a diverse range of gaming experiences.

The COVID-19 pandemic has pushed the number of gamers to an all-time high, with non-gamers picking up video game controllers as a social lifeline, and pre-existing gamers spending even more time and money on gaming activities. Since the start of the pandemic, the industry experienced massive growth with large number of people playing video games and watching gaming video content.

Total Global Video Games Revenue
by segment (USD bn)

Year	Total	Social/Casual Gaming	PC Games	Console Games	Integrated Video Game Advertising
2017	120.4	67.7	25.5	23.8	
2018	139.2	67.7	27.3	25.0	
2019	162.4	67.7	28.9	25.6	
2020	196.9	132.9	31.3	28.6	
2021	214.2	148	33.7	28.3	
2022	214.2	167	35.2	28.3	
2023	235.7	185.8	36.9	29.2	
2024	257.1	204.7	38.6	30.0	
2025	299.9	223.8	40.4	31.1	
2026	321.1	242.7	42.2	31.5	

Legend: ■ Social/Casual Gaming ■ PC Games ■ Console Games ■ Integrated Video Game Advertising
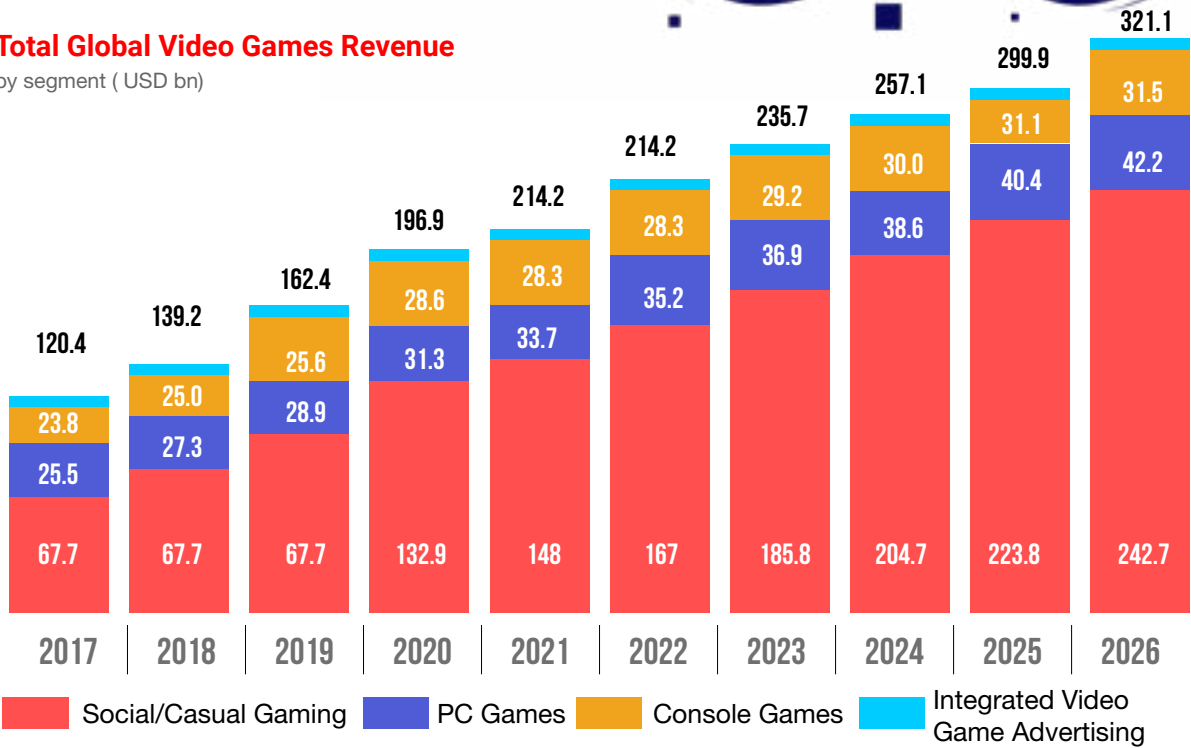
Fig 1 : Global online Gaming Industry
Source : Gaming is booming and is expected to keep growing. This chart tells you all you need to know, World Economic Forum

According to a study by Newzoo International United States, China, Japan, South Korea, Germany, the United Kingdom, France, Canada, Italy, and Brazil are the major countries for online gaming both in terms of revenue and number of players (Table 1)

Table 1 : Top Gaming Markets in 2022

Market	Revenue (USD bn)	Number of Players (mn)
United States	46.4	209.8
China	44.0	699.6
Japan	19.1	73.4
South Korea	7.4	33.3
Germany	6.5	49.5
United Kingdom	5.5	38.5
France	4.1	38.3
Canada	3.3	22.0

Source : Newzoo International 2022

EVOLUTION OF GAMING INDUSTRY

The online gaming ecosystem have evolved over a period of time and this evolution is primarily characterized by various platforms used to catering to the diverse audiences (Fig 2).

PC Gaming: Platforms like Steam, Epic Games, and GOG have become digital distribution hubs for PC gamers, offering a vast array of titles from indie developers to major studios.

Console Gaming: Consoles such as PlayStation, Xbox, and Nintendo Switch remain popular, providing unique gaming experiences and exclusive titles that attract dedicated fanbases.

Mobile Gaming: The advent of smartphones has transformed the landscape, making gaming accessible to a broader demographic. Games like PUBG Mobile, Garena Free Fire, and Among Us have achieved unprecedented popularity on mobile devices.

Cloud Gaming: The emergence of cloud gaming services like Google Stadia and Microsoft xCloud is reshaping how games are accessed. These services allow players to stream games without the need for high-end hardware, providing a glimpse into a future where gaming is more platform-agnostic.

Figure 2 : Evolution of Gaming industry with respect of platform usage
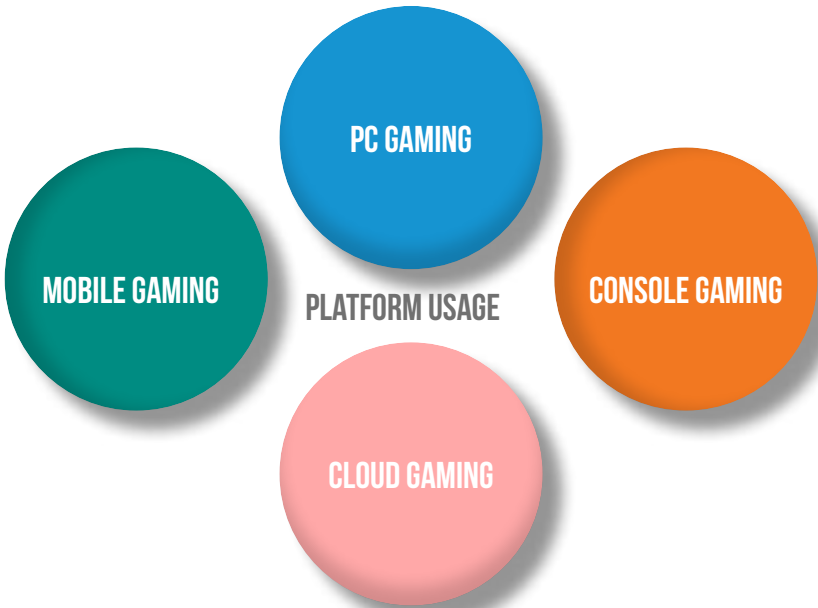
ESPORTS AND COMPETITIVE GAMING

Recent trend in the gaming industry is the rise of esports, short for electronic sports. Esports refers to organized, competitive video gaming which involves professional players, teams, and leagues competing against each other in various video games. Esports has grown rapidly in popularity and has become a major industry with a dedicated fan base, lucrative tournaments, and significant sponsorship deals

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MAJOR STAKEHOLDERS IN GAMING INDUSTRY

The gaming industry is a dynamic ecosystem with various stakeholders playing crucial roles in shaping its growth and direction. Here are some major stakeholders in the gaming industry:

1. **Game Developers and Studios:** These are the companies and individuals responsible for creating and producing video games. They design the gameplay, write the code, and produce the art and music.

2. **Publishers:** Publishers handle the distribution, marketing, and often the funding of game development. They play a crucial role in bringing games to market and managing their commercial success.

3. **Gamers (Players):** The end-users who play games. Gamers are a critical stakeholder group as they drive demand, provide feedback, and shape the gaming community.

4. **Esports Organizations:** Organizations that manage and promote esports teams and players. They organize tournaments, negotiate sponsorships, and contribute to the professionalization of competitive gaming.

5. **Hardware Manufacturers:** Companies producing gaming hardware such as consoles, gaming PCs, graphics cards, and peripherals. Examples include Sony (PlayStation), Micro-soft (Xbox), and NVIDIA.

6. **Platform Holders:** Companies that own and operate gaming platforms, including console manufacturers (e.g., Sony, Microsoft), digital distribution platforms (e.g., Steam, Epic Games Store), and mobile platforms (e.g., Apple, Google).

7. **Investors and Venture Capitalists:** Individuals and firms that provide funding to game developers, publishers, and esports organizations. They play a crucial role in the financial success and growth of the industry.

8. **Streaming Services:** Platforms that facilitate live streaming of gaming content, such as Twitch, YouTube Gaming, and Facebook Gaming.

9. All these stakeholders are engaged in producing various categories of games as per the interest of the gamers worldwide. Online gaming encompasses a diverse range of genres, catering to different interests and playstyles. These categories reflect the variety of gaming experiences available to players. Some major categories of online gaming are listed in Table 2, whereas Table 3 lists the categories of online games according to gamers engagement and difficulty level.

Table 2 : Various categories of online gaming according to Genre

Massively Multiplayer Online (MMO) Games: online games that support large numbers of players interacting in a persistent virtual world. Players can often explore, complete quests, and engage in player-versus-environment (PvE) or player-versus-player (PvP) activities together.
First-Person Shooter (FPS) Games: games of these genre put players in the perspective of a character experiencing the game world from a first-person view. The gameplay often revolves around shooting opponents and achieving specific objectives.
Battle Royale Games: In battle royale games, a large number of players compete to be the last person or team standing in an ever-shrinking play area. These games combine exploration, survival, and combat.
Multiplayer Online Battle Arena (MOBA) Games: MOBAs feature teams of players competing against each other in strategic, objective-based battles. Each player controls a unique character with specific abilities, working together to achieve victory
Real-Time Strategy (RTS) Games: RTS games challenge players to build and manage resources, create armies, and engage in strategic battles in real-time. These games often involve resource gathering, base-building, and tactical decision-making.
Sports and Racing Games: Online sports games simulate real-world sports such as soccer, basketball, or racing. Players can compete against each other individually or as teams, often mirroring the rules and dynamics of the actual sport.
Role-Playing Games (RPGs): RPGs allow players to assume the roles of characters in a fictional world. Online RPGs often feature cooperative or competitive gameplay, character customization, and immersive storytelling.
Card and Board Games: Online versions of traditional card and board games bring classic games like poker, chess, or Scrabble to the digital realm. Players can compete against friends or join global communities.
Simulation Games: Simulation games replicate real-world activities or systems. Online simulations may include life simulation, business management, or vehicle simulation games
Horror and Survival Games: Horror and survival games create intense and immersive experiences, often involving exploration, puzzle-solving, and combat against frightening elements. Some of these games allow for cooperative or competitive multiplayer modes
Educational and Edutainment Games: Online educational games are designed to teach specific concepts or skills. These games can cover a wide range of subjects and may be aimed at various age groups
Social Games: Social games encourage interaction and collaboration between players. These games often involve casual gameplay, virtual worlds, and social activities such as chatting, trading, or creating content.
Fighting Games: Fighting games focus on one-on-one or team-based combat between characters with unique abilities or fighting styles. Players compete to deplete their opponent's health bar.
Puzzle Games: Puzzle games challenge players' problem-solving skills and creativity. Online puzzle games may involve solo or multiplayer modes, encouraging competition or collaboration

Table 3: Online Gaming category according to Gamers engagement and level of difficulty

Gaming Category	Description
RMG (Real Money Gaming)	Involves online games where players can wager real money.
Hypercasual Gaming	Hypercasual games are designed for mass appeal, often featuring quick rounds and straightforward gameplay.
Casual Gaming	Games designed for a broad audience, with simple gameplay mechanics and easy-to-understand controls.
Midcore Gaming	Falls between hardcore and casual gaming. These games provide engaging experiences without the extreme difficulty of hardcore games.
Hardcore Gaming	Hardcore games are complex and have challenging levels. Gamers often invest significant time and effort into mastering the games they play.
Esports	Esports involve multiplayer games in various genres, and events are often broadcasted.
Streaming Online Games	Refers to the practice of broadcasting live gameplay over the internet. Platforms like Twitch and YouTube Gaming are popular for game streaming.
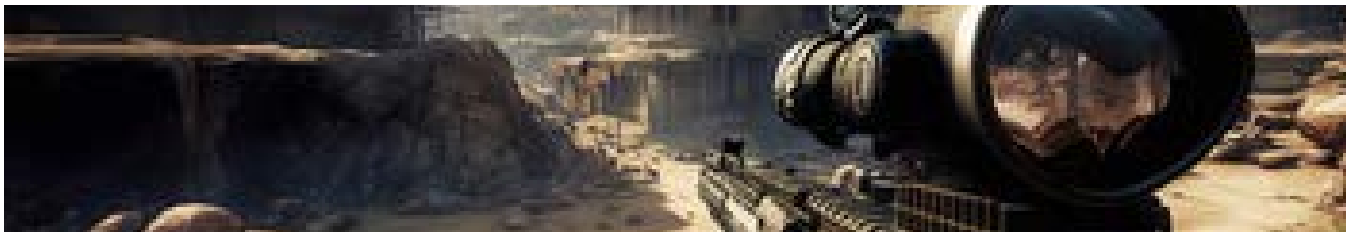
GAMING INDUSTRY IN INDIA

According to 'India Gaming Report 2021 by Lumikai, India's gaming market was worth $2.6 billion in FY2022, and is expected to reach $8.6 billion by 2027, growing at a compounded annual growth rate of 27 percent. There are 507 mn gamers in India out of which 120 mn are paying users and average revenue per paying user was $20/year in FY22. Share of Real Money Games (RMG) is 57% in the online gaming market in India, and in-app purchase are expected to drive the future growth at a 34% CAGR. In 2022, with 15 billion game downloads, India had the highest share (17%) globally. The growth in the Industry is also further fuelled by 100% FDI under automatic route in the gaming sector. In last five years Indian gaming companies have raised a total of $2.8Bn. There are around 900 gaming companies in India, a vast majority of which fall within the MSME sector. Apart from FDI significant contribution in the industry is also through sponsorships and e-sports tournaments. are contributing to the influx of significant investment into the gaming industry. According to HP India's Gaming Landscape Study 2023 nearly half of serious gamers are earning around Rs 6 to 12 lakh annually by pursuing their passion for gaming. So online gaming is not an arena for fun but is also a viable career option.

This growth in gaming industry in India can be attributed to several factors, like internet penetration, increase in sales of smartphones, increase in gamers in Tier-II and Tier-III cities. Lockdown during pandemic provided the necessary momentum to the gaming sector, when people looked at gaming options in addition to the available options like engagement on OTT and social media platforms. Considering the immense growth in the online gaming market in India developers localized their content to cater to Indian audiences. Further online payment also facilitated in-app purchases and payment of competition entry fees.

As the online gaming industry is gaining momentum, startups are reshaping the gaming landscape. From mobile gaming sensations to cutting-edge virtual reality experiences, these gaming startups have demonstrated their mettle in the highly competitive arena, setting new benchmarks for creativity, technology, and user engagement. List of leading startups in India is provided in Table 4 along with the innovative games offered by them to the Indian gamers. The gaming industry is duly supported by gaming studio and associations, which are listed in table 5 and 6 respectively.

Table 4 : Gaming Startups in India

Startup	Description	Notable Games
Nazara Technologies	Mobile gaming with a diverse portfolio.	Cricket League, Chhota Bheem Speed Racing
Dream11	Fantasy sports platform.	Dream11, FanCode
Mobile Premier League (MPL)	Mobile gaming platform with fantasy, casual, and esports games.	MPL Games, WCC Rivals
RummyCircle (Play Games24x7)	Online rummy platform.	RummyCircle, Ultimate Teen Patti
Pocket52	Real-money poker platform.	Pocket52
Gamezop	Casual gaming platform.	Quick Brain, Knife Up, Tetroid
Octro	Social and casual games.	Teen Patti, Indian Rummy
Fampay	Family-focused banking app with a gaming section.	Financial literacy quizzes and games
Kwalee	Mobile game developer with a focus on hyper-casual games.	Rocket Sky!, Draw It
Gameberry Labs	Developer of Ludo Star.	Ludo Star
Vishesh Films Gaming	Gaming venture by Vishesh Films, creating Bollywood-themed games.	Jalebi - A Desi Word Game
JetSynthesys	Digital entertainment and technology company with a gaming division.	Sachin Saga Cricket Champions, LudoLive

Table 5 : Major gaming studios in India

Gaming Studio	Description	Notable Games
Moonfrog Labs	Casual and social mobile games.	Ludo Club, Baahubali: The Game
nCore Games	Mobile game developer, known for FAU-G.	FAU-G: Fearless and United Guards
99Games	Prolific mobile game developer across genres.	Star Chef, Dhoom: 3 The Game
MADFINGER Games	International studio with a significant presence in India.	Shadowgun Legends, Dead Trigger 2
Dhruva Interactive	Offers game design, art production, and development services.	Nba Live, Halo 5: Guardians (Contributions)
Smilegate Megaport	Global gaming company with a studio in India.	Crossfire: Warzone, Super Tank Rumble
Ubisoft Pune and Ubisoft Mumbai	Part of the international Ubisoft network.	Assassin's Creed: Valhalla, Just Dance 2021
Roosh Interactive	Specializes in mobile game development.	War Troops, Crazy Truck
Glu Mobile Hyderabad	Part of Glu Mobile, contributing to mobile game development.	Kim Kardashian: Hollywood, Design Home
Xigma Games	Known for developing unique and engaging games.	Mr Autofire, Buff Knight Advanced
Pirate Kings Studio	Focuses on casual and social games.	Pirate Kings, Board Kings
PlaySimple Games	Creates casual and puzzle games for mobile platforms.	Word Trip, Daily Themed Crossword
Rogue Games India	Part of the global Rogue Games network.	Chaos Battle League, Olo Loco

Table 6 : Major Gaming Associations in India

Association	Description
NASSCOM Gaming Forum	Part of NASSCOM, promotes growth and collaboration in the gaming industry.
All India Gaming Federation (AIGF)	Self-regulatory body for online skill gaming, establishes best practices.
Esports Federation of India (ESFI)	Governing body for esports, focuses on organizing and regulating competitions.
India Gaming Show (IGS)	Initiative by CII, brings together stakeholders in the gaming industry.
Indian Digital Gaming Society (IDGS)	Non-profit organization promoting digital gaming as a sport in India.
Mobile Games Forum (MGF)	Focuses on mobile gaming, provides a platform for industry professionals.
Indian Gaming League (IGL)	Platform for hosting esports tournaments and leagues.
Indian Federation of Sports Gaming (IFSG)	Represents fantasy sports platforms, advocates for responsible gaming.

CHALLENGES FOR GAMING COMPANIES IN INDIA

The online gaming industry, while thriving, faces several challenges that impact its development and sustainability. These challenges encompass various aspects, ranging from technological hurdles to societal perceptions. Some challenges faced by the online gaming industry are:

- Uneven internet connectivity and infrastructure limitations
- need for a skilled workforce
- High cost of High-end gaming hardware
- Negative societal perceptions about gaming negatively
- Issues related to content regulation, age restrictions, and gambling aspects in gaming
- Ensuring sustainable and ethical monetization models can be challenging. Striking a balance between generating revenue through in-app purchases, advertisements, or subscription models, while ensuring a positive user experience, is an ongoing challenge.
- data protection and data privacy issues
- Cybersecurity issues like hacking and other malicious activities
- concerns about addiction, particularly among younger players
- Maintaining high-quality standards for immersive gaming experience for gaining gamers confidence

GOVERNMENT INITIATIVES TO PROMOTE GAMING IN INDIA

There is no doubt that Indian online gaming industry will grow by leaps and bounds in the coming years. The growth will be further propelled by the several government initiatives in India have been aimed at promoting the gaming industry.

100% Foreign Direct Investment (FDI) in Gaming: The Indian government has permitted 100% FDI in the gaming sector, allowing foreign investors to invest without restrictions within the Electronic System and IT & BPM sectors.

Information Technology (Intermediary Guidelines and Digital Media Ethics Code) Rules 2021: Amended to add provisions for online gaming, the rules aim to protect online gamers from harmful content and addiction. A self-regulatory framework has been implemented for the online gaming sector.

Self-Regulatory Bodies (SRBs): As per the IT Rules 2021, SRBs validate games that can operate in the country. They regulate online real money games offered by intermediaries, ensuring adherence to guidelines that prevent addiction and mental harm.

Promotion of Digital Payments: The promotion of online payments facilitates in-app purchases and payment of competition entry fees, contributing to the growth of the gaming industry.

AVGC Promotion Task Force: The Animation, Visual Effects, Gaming, and Comics (AVGC) Promotion Task Force was established to recommend strategies for developing domestic capabilities to meet the needs of both Indian and global markets in the AVGC sector.

National Centre of Excellence (COE) for AVGC: The task force proposed the creation of a National Centre of Excellence for the AVGC sector. This center aims to establish international standards in skilling, education, industry development, and research & innovation within the AVGC sector.

Regional Centres of Excellence: Collaborative efforts with State Governments have led to the creation of Regional Centres of Excellence, facilitating local industry access and promoting regional talent and content.

Support for Esports: While not always direct initiatives, the government has acknowledged the rise of esports, and the overall growth of the gaming sector indirectly benefits competitive gaming.

WAY FORWARD

The gaming industry in India is experiencing remarkable growth, with increasing numbers of gamers, expanding revenue, investment in the sector and growing number of startups. The market has lot of potential for further expansion by leveraging mobile gaming trends, participation of gamers in tier 2 and tier 3 cities, collaborations for innovation and embracing technological advancements. Advancements in gaming technology, including virtual reality (VR), augmented reality (AR), and artificial intelligence (AI), should be integrated for more immersive and engaging gaming experiences.

Indian gaming companies have started exploring opportunities in the global market. India's two major gaming-focused streaming platforms, Loco and Rooter, are expanding operations beyond the domestic market as they prepare to take on YouTube and Amazon's Twitch in foreign territories. Opportunities in Esports is another Esports had been gaining popularity, with India emerging as a significant player in the global esports arena.

While challenges exist, the future outlook for the Indian gaming industry remains positive as it continues to evolve and innovate.

SEPC PAVILLION AT MIPCOM 2023

SEPC along with the ministry of I&B and Commerce participated in MIPCOM 2023. The event saw a great turnout, with over 60 companies participating from India. It is a tremendously positive step towards the growth in the AVGC sector.
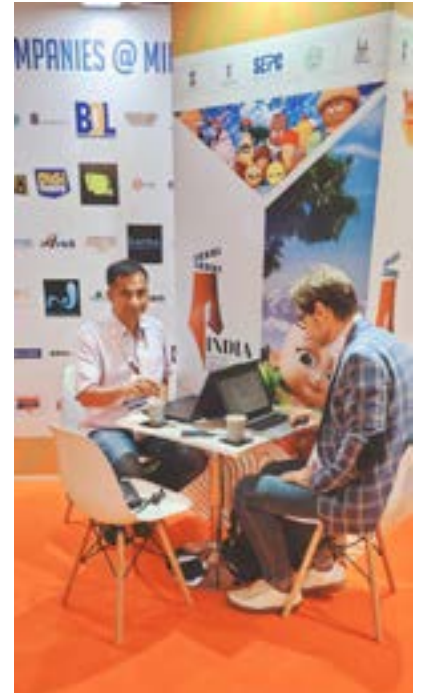
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remarkable contribution in our services
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ESTABLISHMENT DAY
MAKING INDIA A GLOBAL SERVICES EXPORT POWERHOUSE
KEY ACHIEVEMENTS

- India's services export surged by 72% in the last 5 years
- Sectoral exports soared by 28% in FY 2022-23
- Growth driven by manufacturing, business, telecom and more
- Travel sector grew by 767% & transport by 77% in 2022-23
- India ranks 3rd globally in startups, largely in the services sector

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INDO-PACIFIC ECONOMIC FRAMEWORK FOR PROSPERITY

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Happy Diwali
Wishing you and your family a Diwali full of joy,
prosperity, and success. Happy Diwali!

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SEPC India @Sepc_India · 10 Nov
"On this auspicious day, may Goddess Lakshmi bless you with abundant riches and good fortune" ~ Mr. Karan Rathore, Chairman @Sepc_India

#Happydhanteras2023 #dhanteras2023 #GoddessLakshmi #BHARAT

SEPC India @Sepc_India · 06 Nov
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Breast cancer is a significant health concern in India. The incidence of breast cancer has been on the rise in recent years. Several factors contribute to this trend.

Increasing Population: India's growing population means more individuals are at risk for breast cancer.

Changing Lifestyle: Urbanization and the adoption of Western lifestyles have led to changes in dietary habits and reduced physical activity, which can increase the risk of breast cancer.

Genetic Factors: Studies suggest that certain genetic factors may contribute to the incidence of breast cancer in specific regions of India.

Hormonal Factors: Early age of menstruation, late age of menopause, and fewer pregnancies can be risk factors.

However, advances in medical science and treatment options have offered new hope to patients. One such treatment option that has gained prominence is Breast-Conserving Surgery (BCS), also known as lumpectomy.

BCS aims to preserve as much of the healthy breast tissue as possible while removing the cancerous tumor. This approach helps women maintain a natural breast appearance, which can significantly impact their self-esteem and body image.

Studies have shown that BCS is as effective as mastectomy (complete breast removal) in treating early-stage breast cancer when followed by radiation therapy. It allows for the removal of cancerous tissue while minimizing the physical and emotional impact on the patient.

During the surgical procedure, the surgeon removes the tumor along with a surrounding margin of healthy tissue. The goal is to ensure all cancer cells are eliminated while preserving as much of the breast as possible.

Benefits of BCS:
Improved Quality of Life:
One of the primary benefits of BCS is its positive impact on a patient's quality of life. The preservation of the breast's appearance can boost self-confidence and emotional well-being.

Equivalent Survival Rates:
Extensive research has shown that BCS followed by radiation therapy offers survival rates comparable to mastectomy. Thus, patients can opt for this less invasive approach without compromising their chances of survival. Oncoplastic breast cancer surgery is a surgical approach that combines oncology (cancer treatment) and plastic surgery techniques. It aims to remove cancerous tissue while preserving the appearance and contour of the breast as much as possible. This approach is often used for breast-conserving surgery after lumpectomy, where the cancerous lump is removed along with some surrounding tissue.

The goals of oncoplastic surgery include:
Complete cancer removal: Ensuring all cancerous tissue is removed to reduce the risk of recurrence.Cosmetic outcomes: Minimizing changes to the breast's appearance and symmetry.

Preservation of breast function.
Oncoplastic surgery can involve techniques like reshaping the breast, repositioning tissue, and even using breast implants or fat grafting to restore the breast's appearance. It's typically performed by a surgical team that includes both a breast cancer surgeon and a plastic surgeon.

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