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Mammography Systems Market - A Global and Regional Analysis: Focus on Product, End User, Regional, and Country Analysis - Analysis and Forecast, 2026-2036

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Abstracts

The global mammography systems market, initially valued at $2,663.0 million in 2025, is projected to witness substantial growth, reaching $6,375.3 million by 2036, marking a remarkable compound annual growth rate (CAGR) of 8.29% over the period from 2026 to 2036.

The mammography systems market is being shaped by the growing need for accurate, standardized, and high-quality breast imaging across screening, diagnostic, and follow-up care settings. Mammography remains the primary imaging modality for early breast cancer detection and continues to play a central role in national screening programs, hospital radiology departments, dedicated breast centers, and outpatient diagnostic facilities. Ongoing advances in system design are transforming conventional mammography into a more efficient and clinically capable platform through features such as digital image acquisition, breast tomosynthesis, synthesized 2D imaging, automated workflow support, dose management, and improved patient-positioning technologies. These system-level improvements are particularly valuable in high-volume screening environments and specialist breast imaging practices, where diagnostic confidence, exam consistency, throughput, and patient comfort are critical.

Technological innovation is significantly enhancing the performance and usability of modern mammography systems. Developments such as AI-assisted image analysis, intelligent acquisition workflows, enhanced lesion visualization, low-dose imaging protocols, and integrated biopsy guidance are helping improve detection accuracy while reducing variability across operators and sites. In addition, the increasing use of digital

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breast tomosynthesis and advanced software tools is expanding the role of mammography systems beyond routine screening into more precise diagnostic assessment, especially in women with dense breast tissue. Although high equipment costs, infrastructure requirements, reimbursement variability, and limited access to trained breast imaging specialists may constrain adoption in some markets, continued progress in automation, image quality, and workflow efficiency is expected to support long-term market growth, positioning mammography systems as a core component of modern breast care infrastructure.

Market Introduction

The global mammography systems market is evolving steadily as healthcare systems place increasing emphasis on early detection and improved diagnostic accuracy for breast cancer, the most commonly diagnosed cancer among women worldwide. Mammography continues to serve as the primary imaging modality for breast cancer screening and diagnosis, forming the backbone of both organized population-based screening programs and opportunistic diagnostic pathways. The market is witnessing a transition from conventional analog systems to advanced digital mammography and digital breast tomosynthesis (DBT) platforms, driven by the need for higher image clarity, better lesion detection particularly in dense breast tissue and improved workflow efficiency in high-volume clinical environments.

Continuous technological advancements are reshaping modern mammography systems, with innovations focused on 2D/3D hybrid imaging, DBT integration, and AI-assisted image interpretation. These developments are enhancing diagnostic confidence, reducing recall rates, and supporting radiologists in managing increasing screening volumes with greater efficiency. The growing adoption of integrated imaging platforms that combine mammography with advanced software, PACS connectivity, and automated quality control is further improving operational consistency across healthcare facilities. Although adoption varies across regions depending on infrastructure maturity and reimbursement frameworks, the strong clinical need for early detection, coupled with rising awareness and expanding screening initiatives, is expected to support sustained long-term growth of the mammography systems market globally.

Industrial Impact

The global mammography systems market is having significant impact on the breast imaging industry by driving the transition toward more advanced, digital, and clinically integrated breast care platforms. Major companies such as Hologic, Inc., GE

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HealthCare, Siemens Healthineers, FUJIFILM, Canon Medical Systems, Planmed Oy, and Metaltronica are continuously enhancing mammography systems with capabilities such as digital breast tomosynthesis, synthesized 2D imaging, dose optimization, biopsy integration, and AI-supported workflow tools. These advancements are particularly important in breast screening programs, oncology centers, women's health clinics, and diagnostic imaging departments, where image quality, reading efficiency, and early lesion detection are critical. As a result, mammography systems are moving beyond their traditional role as standalone screening devices and becoming central components of more comprehensive breast imaging pathways.

Moreover, ongoing innovation in mammography systems is reshaping purchasing priorities, service models, and technology competition across the medical imaging sector. Healthcare providers are increasingly evaluating systems not only on image acquisition performance, but also on workflow speed, patient comfort, interoperability, and compatibility with advanced applications such as tomosynthesis-guided biopsy and AI-assisted image interpretation. This is encouraging manufacturers to develop more intelligent, ergonomic, and scalable platforms that can support both high-volume screening and complex diagnostic workflows. At the same time, growing demand for early cancer detection, expansion of breast imaging services, and replacement of aging analog or first-generation digital units are supporting long-term market momentum. By improving diagnostic confidence, enabling more efficient breast care delivery, and strengthening the infrastructure for population screening and personalized diagnosis, mammography systems are playing an increasingly important role in the evolution of modern women's healthcare.

Market Segmentation:

Segmentation 1: By Product

Analog Mammography Systems

Digital Mammography Systems

Digital Mammography Systems Segment to Dominate the Mammography Systems Market (by Product)

Digital mammography systems dominate the market as they represent the most balanced combination of clinical acceptance, installed infrastructure, cost efficiency, and

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operational scalability across healthcare settings. Following the global transition from analog film-based mammography, digital systems became the default platform for breast cancer screening and diagnosis, enabling faster image acquisition, seamless storage and retrieval via PACS, and improved workflow integration within radiology departments. Their widespread adoption is further reinforced by their ability to function effectively across diverse care environments, including national screening programs, community hospitals, diagnostic centers, and mobile screening units, making them the core “workhorse” technology of breast imaging.

In addition, digital mammography offers a more affordable and accessible solution compared to advanced modalities such as DBT, which require higher capital investment, greater data handling capacity, and more complex workflow adjustments. This cost advantage is particularly important in mid- and low-resource healthcare systems, where budget constraints limit rapid adoption of newer technologies. The segment also benefits from strong clinician familiarity and established reimbursement frameworks, as mammography remains the primary recommended screening tool in most national guidelines, reducing adoption barriers and supporting consistent utilization.

Segmentation 2: By End User

Hospitals and Ambulatory Surgical Centers

Diagnostics Center

Other End User

Hospitals and Ambulatory Surgical Centers Segment to Dominate the Mammography Systems Market (by End User)

Hospitals and ambulatory surgical centers (ASCs) dominate the mammography systems market because they concentrate the highest volume of breast imaging, diagnostic follow-ups, and interventional procedures within integrated care settings. These facilities function as complete breast-care hubs, where patients can move seamlessly from screening to advanced imaging, biopsy, surgical consultation, and oncology referral when required, making them the most efficient and commercially viable end users for mammography systems, including advanced technologies such as digital mammography and DBT.

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They also lead adoption due to their stronger financial capacity and supporting infrastructure, as mammography systems require significant capital investment, dedicated imaging suites, radiation shielding, PACS integration, and trained radiology personnel resources that hospitals and ASCs are better equipped to provide compared with smaller standalone centers. In addition, high patient throughput driven by outpatient clinics, referral networks, and women's health services ensures strong equipment utilization rates, improving return on investment for these systems.

Hospitals, in particular, benefit from centralized referral flows from primary care physicians and specialists, especially for diagnostic mammography, dense-breast evaluation, and cancer workups, which further reinforces equipment adoption at the institutional level. Meanwhile, ASCs are increasingly important as breast imaging and minor procedures shift toward outpatient models, enabling faster, cost-efficient care delivery and reducing inpatient burden.

Segmentation 3: By Region

- North America
  - U.S.
  - Canada
- Europe
  - U.K.
  - Germany
  - France
  - Italy
  - Spain
  - Rest-of-Europe
- Asia-Pacific

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China

Japan

India

Australia

South Korea

Rest-of-Asia-Pacific

Latin America

Brazil

Mexico

Rest-of-Latin America

Middle East and Africa

North America to Dominate the Mammography Systems Market (by Region)

North America dominates the mammography systems market due to its combination of high and structured screening volumes, early adoption of advanced imaging technologies, strong reimbursement frameworks, and mature healthcare infrastructure that enables rapid technology replacement cycles. In the U.S., breast cancer screening is deeply integrated into clinical practice and supported by federally regulated MQSA-certified mammography facilities, while Canada operates organized or semi-organized screening programs across all provinces for average-risk women, ensuring consistent and recurring imaging demand. The region also maintains a strong public health emphasis on early breast cancer detection, driving continuous investment in both digital mammography and digital breast tomosynthesis (DBT) platforms. Adoption of advanced technologies is significantly ahead of other regions, with DBT already widely deployed across a majority of U.S. facilities, reflecting faster conversion from standard mammography to higher-value imaging systems. Additionally, well-established

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reimbursement systems in the U.S. and publicly funded screening structures in Canada create predictable demand and support regular capital equipment upgrades. This is further reinforced by stringent quality and regulatory frameworks, such as MQSA in the U.S. and Health Canada standards, which ensure consistent imaging quality and facilitate large-scale deployment of advanced mammography systems. Together, these factors position North America as the most mature and technologically advanced region in the global mammography systems market.

Recent Developments in the Mammography Systems Market

In November 2025, GE HealthCare received FDA Premarket Authorization for Pristina Recon DL, an advanced 3D mammography image reconstruction technology. Leveraging deep learning, this innovation enhances image clarity and sharpness, setting a new benchmark in mammography imaging quality.

In November 2025, At the 2025 Radiological Society of North America Annual Meeting, Siemens Healthineers unveiled enhanced capabilities for its Mammomat B.brilliant mammography system, strengthening both contrast-enhanced imaging and biopsy functions. The system, which already delivers high-resolution 3D breast images using wide-angle tomosynthesis in just five seconds, will now also incorporate a newly developed image reconstruction technique to further improve contrast-enhanced examinations.

In May 2025, Siemens Healthineers has introduced the MAMMOMAT B.brilliant in Indonesia, a next-generation mammography system designed to enhance breast imaging capabilities.

In November 2024, GE HealthCare introduced the new Pristina Via mammography system, created to improve the screening experience for both technologists and patients.

Demand – Drivers, Challenges, and Opportunities

Market Drivers:

Increasing Incidence of Breast Cancer: The increasing incidence of breast cancer is one of the major factors driving the demand for mammography systems across the world. According to Breastcancer.org, breast cancer is currently the most common cancer

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among women worldwide, with approximately 2.3 million new cases reported globally in 2023, accounting for one in four cancers among women. In addition, as per the study titled “Global, regional, and national burden of breast cancer among females, 1990–2023, with forecasts to 2050: a systematic analysis for the Global Burden of Disease Study 2023” published by The Lancet Oncology in March 2026, the global number of new breast cancer cases is expected to increase by about one-third, rising from 2.3 million in 2023 to more than 3.5 million by 2050. Meanwhile, annual deaths from breast cancer worldwide are projected to grow by 44%, climbing from 764,000 to nearly 1.4 million by 2050

This upward trend is evident across both developed and developing regions. The high-income regions, such as North America, Northern Europe, Australia, and New Zealand, report the highest incidence rates, driven by lifestyle factors and robust screening programs that enable greater detection. In contrast, low- and middle-income regions, particularly Western Africa and parts of Oceania, experience disproportionately high mortality rates due to limited access to early screening and treatment. According to the data published by the World Health Organization in February 2025, in countries with very high Human Development Index (HDI), approximately 17 out of 100 women diagnosed with breast cancer die from the disease, whereas in low-HDI countries, more than 56 out of 100 women diagnosed do not survive, highlighting significant gaps in early screening and healthcare access. This has raised the demand for mammography systems.

Market Challenges:

Shortage of Trained Professionals: A key restraint for the mammography systems market is the global shortage of trained radiologists and mammography technologists, which limits the effective utilization of installed imaging infrastructure. While demand for breast imaging continues to rise, the supply of skilled professionals required to acquire, interpret, and report mammography results has not kept pace, creating a structural imbalance where diagnostic capacity is constrained by workforce availability rather than equipment supply. As a result, many healthcare systems face underutilization of advanced mammography assets despite growing screening volumes.

This gap is particularly evident in the United States. According to a February 2026 report by Medicus Healthcare Solutions, approximately 7,500 breast imaging radiologists are responsible for a screening population of nearly 130 million women aged 40 and above, equating to roughly four specialists per 100,000 women. The challenge has been further intensified following the U.S. Preventive Services Task

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Force's decision in 2024 to lower the recommended screening age from 50 to 40, which added an estimated 20 million additional eligible women for screening. However, radiologist workforce expansion has not kept pace with this increase in demand, widening the gap between screening requirements and diagnostic capacity and placing sustained pressure on mammography service delivery.

Market Opportunities:

Untapped Market Opportunity for Mammography Systems in Emerging Economies: Emerging economies represent a significant growth opportunity for the mammography systems market, driven by the rising global burden of breast cancer and substantial gaps in screening access and diagnostic infrastructure. Many low- and middle-income countries continue to face limited availability of mammography equipment, uneven healthcare distribution, and low screening participation rates, resulting in delayed diagnoses and higher mortality outcomes. As a result, governments in countries such as India, Indonesia, and South Africa are increasingly prioritizing population-based screening initiatives and investing in diagnostic imaging capacity, which is expected to accelerate the adoption of mammography systems over time.

Evidence from Latin America further highlights these structural gaps, where screening coverage remains uneven and generally ranges between 20% and 60% across countries. For instance, in Mexico, effective screening coverage is below 25%, while Peru reports rates of approximately 23–25%, falling further in rural and uninsured populations. Similarly, in countries such as Chile and Brazil, women from lower-income groups are significantly less likely to undergo regular screening, reflecting strong socioeconomic disparities in access to early detection services. Geographic imbalances also persist, with Brazil showing heavy concentration of mammography infrastructure in developed urban regions, while rural areas remain underserved, and Peru demonstrating substantially lower screening access in rural populations compared to urban centers. Collectively, these disparities underscore a large unmet clinical need and position emerging markets as high-potential regions for long-term mammography system expansion.

How can this report add value to an organization?

Growth/Marketing Strategy: Strategic partnerships, public-private collaborations, and geographic expansion are key growth levers in the mammography systems market. OEMs are increasingly targeting hospital networks, diagnostic chains, and government screening programs, while also focusing on emerging markets to address unmet

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screening demand. Expansion into mobile screening units, retrofit upgrades from analog to digital systems, and integration with national breast cancer screening initiatives are enabling wider adoption and penetration into under-served regions.

Competitive Strategy: The mammography systems market is highly competitive, with leading OEMs focusing on technological differentiation through advanced imaging performance, AI-assisted diagnostics, and workflow efficiency. Companies are increasingly competing on integrated solutions that combine hardware, software, and analytics to reduce radiologist workload and improve diagnostic consistency. Competitive advantage is increasingly defined by clinical accuracy, ease of use, interoperability with hospital systems, and the ability to support high-volume screening environments.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

Years from 2024 to 2036 have been considered for the global market size estimation, 2025 has been considered as the base year, and 2026 to 2036 as the forecast period.

The scope of the report is based on comprehensive inputs from industry experts across various sectors, including hospitals, diagnostic laboratories, imaging centers, and research institutions.

The market contribution of mammography systems is anticipated to grow substantially in the future, with projections based on historical analysis of available solutions.

Revenues from companies have been sourced from their annual reports for FY2024 and FY2025. For private companies, revenue estimates are derived from primary research inputs, funding history, market collaborations, and operational performance.

The market has been mapped based on the existing mammography systems. Key companies with significant offerings in this field have been identified and profiled in this report.

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Primary Research

The primary sources involve industry experts and key stakeholders across the healthcare and radiography ecosystem, including mammography manufacturers (OEMs), medical device companies, radiology service providers, and healthcare institutions. Stakeholders such as hospitals, imaging centers, and screening programs have been consulted to validate adoption trends, system-level integration, and clinical utility specific to mammography systems. Respondents, including CEOs, vice presidents, product and marketing directors, and technology and innovation leaders, have been interviewed to obtain and verify both qualitative and quantitative insights for this research study.

The key data points taken from the primary sources include:

validation and triangulation of all the numbers and graphs

validation of report segmentations and key qualitative findings

understanding the competitive landscape and business model

current and proposed production values of a product by market players

validation of the numbers of different segments of the market in focus

percentage split of individual markets for regional analysis

Secondary Research

Open Sources

Certified publications, articles from recognized authors, white papers, directories, and major databases, among others

Annual reports, SEC filings, and investors' presentations of the leading market players

Company websites and a detailed study of their product portfolio

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Gold standard magazines, journals, white papers, press releases, and news articles

Paid databases

The key data points taken from the secondary sources include:

segmentations and percentage shares

data for market value

key industry trends of the top players in the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies profiled have been selected based on inputs gathered from an analysis of company coverage, product portfolio, and market penetration.

Some prominent names established in this market are:

Allengers

BMI Biomedical International s.r.l

Canon Inc.

DMS Group

FUJIFILM Corporation

GE Healthcare

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Genoray Co., Ltd.

Hologic, Inc.

IMS Giotto S.p.A.

Metaltronica S.p.A.

Planmed Oy

Siemens Healthineers

Shanghai United Imaging Healthcare Co., Ltd.

Trivitron Healthcare

VillaSistemi Medicali S.p.A.

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2024-2036

Table 53: Global Mammography Systems Market, Key Strategies and Developments (by Company), January 2023-March 2026

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