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Mammography Market Assessment, By Type [Screen-Film Mammography, Digital Systems, Analog Systems, Others], By Technology [Digital Mammography, Computer-Aided Detection, Breast Tomosynthesis], By Application [Screening Mammography and Diagnostic Mammography], By End-users [Hospital, Diagnostic Centres, Speciality Clinics, Others], By Region, Opportunities and Forecast, 2017-2031F

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Abstracts

Global Mammography Market size was valued at USD 2.93 billion in 2023 which is expected to reach USD 5.7 billion in 2031 with a CAGR of 8.68% for the forecast period between 2024 and 2031. Growth in the global mammography market is driven by various factors such as the rising prevalence of breast cancer, the increased number of geriatric populations, technological advancements, integration of artificial intelligence, government initiatives, policies, and programs. Increasing investments by private and public sectors in the imaging solutions, presence of several top players and strategies such as mergers, acquisitions, collaborations, and product launches are driving the global mammography market growth. The global mammography market is experiencing robust growth due to increasing prevalence of breast cancer across the world. 297,790 women in the United States were diagnosed with invasive breast cancer in 2023, while 55,720 women were diagnosed with non-invasive breast cancer. Globally, female breast cancer is the 5th leading cause of mortality.

For faster disease diagnosis, application of mammography for screening as well as diagnostic purpose is important. Other factors such as introduction of latest

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mammography technologies in healthcare facilities and integration of artificial intelligence in mammography for quick and accurate detection is further accelerating growth in global mammography market. Governments around the globe are setting up policies and programs at national and international level, to increase awareness regarding screening and proper management of breast cancer. These initiatives are attracting public and private companies to join and invest in research and development to provide quality and advanced medical treatment. Developed countries are experiencing increasing demand for 3D mammography, as it improves diagnostic accuracy by 25% and decreases the number of false positives by 15%.

Increased prevalence of Breast Cancer

The increasing prevalence of breast cancer, globally, is a major factor driving the global mammography market. As per WHO, more than 2.3 million women were diagnosed with breast cancer and more than 685,000 deaths accounted for breast cancer globally. Breast cancer is one of the most common forms of cancer for women. Family history of breast cancer, excessive tobacco and alcohol consumption, history of radiation exposure are the leading risk factors for the rising prevalence of breast cancer, around the world. Medical imaging technologies such as mammography play a crucial role in early diagnosis of breast cancer as it is a non-invasive procedure and can detect cancer cells, even before symptoms arises, this has made it the frontline breast cancer screening tool for several decades. With growing breast cancer awareness regarding screening techniques in developing countries, demand for mammography is also expected to increase in the forecasted period.

Technological Advancement

Today’s world of digitalization and artificial intelligence has revolutionized advancement in mammography. Artificial intelligence has a significant role in mammography, offering several benefits such as improved accuracy and early diagnosis. In recent years, there has been a surge of innovative technologies to overcome traditional screening approaches' limitations. 3D mammography, also known as tomosynthesis or 3D breast imaging, offers several benefits over traditional 2D mammography such as improved cancer detection, reduced need for follow-up imaging, and gives imaging details of the three anatomical body planes-coronal, sagittal and transverse. Integration of AI in 3D mammography technique can further enhance diagnostic accuracy. Many medical device manufacturing companies are launching AI-integrated mammography devices to improve their product portfolio and for providing better health outcomes to the patients. For instance, on November 2023, GE HealthCare announced the launch MyBreastAI

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Suite, an all-in-one platform for artificial intelligence enabled mammography. This app has three AI applications from iCAD including ProFound AI for digital breast tomosynthesis, SecondLook for 2D mammography and PowerLook Density Assessment. This helps clinicians in early detection of breast cancer, by improving patient outcomes, and operational productivity.

Government Initiatives

Mammography improves treatment outcomes in patients by early detection and diagnosis of cancer cells, even before there are any signs and symptoms of cancer in the individual. As early detection and screening are the best approach for breast cancer, governments have initiated several policies and programs emphasizing the importance of screening breast cancer and are investing billions of dollars in research and development in healthcare facilities, including innovation in medical diagnosis techniques for mammography. For instance, WHO's Global Breast Cancer Initiative (GBCI), that was established in 2021 for a period of 20 years, was initiated with the aim to bring together stakeholders around the world and across different sectors with a common goal of reducing breast cancer by 2.5% each year. Global Breast Cancer Initiative is focussed on 3 key strategies to achieve these objectives: health promotion and early detection, timely diagnosis, and comprehensive breast cancer management.

Increasing Demand for 3D Mammography

3D mammography has become a standard of care within hospitals and imaging centers. 3D mammography offers several advantages, such as a lower dosage of radiation compared to 2d mammography, high accuracy, and reduced radiation exposure. Due to numerous benefits, several hospitals and imaging centers are opting for 3D systems as compared to 2D systems that are often ineffective in detecting early signs of cancer. Major players are launching innovative 3D mammography imaging solutions in many countries. For instance, in September 2023, at European Society of Breast Imaging conference in Spain, Siemens Healthineers presented Mammomat B. brilliant, which is a new wide-angle 3D mammogram. It consists of a tube that moves around the breast at wide 50° angle and takes only 5 seconds of scan time which makes it the fastest wide-angle tomosynthesis available on the market. Mammomat B.brilliant helps in quick and accurate detection of abnormalities and microcalcifications in the tissues by providing 3d images with high depth resolution.

Screening Mammography is Dominating the Market in Terms of Application

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Mammography is used for both screening and diagnostic purpose. However, with increasing government support in organizing and encouraging annual screening program, the application of mammography for screening purpose is witnessing a huge growth potential. Mammography application during screening is recommended for women who don't have any sign or symptoms of breast cancer. Mammography has the potential to detect even a small change or lesions in the breast, which makes it very popular among organizations for screening purposes. For instance, in May 2023, U.S. Preventive Services Task Force, stated that women aged between 40 and 74 years should have screening mammograms in every two years. This recommendation was made as more women in their 40s are diagnosed with breast cancer, thus screening at an earlier stage increase the chances of survival for the patient.

Future Market Scenario

The global mammography market is expected to grow tremendously in the coming years due to multiple factors such as the increasing prevalence of breast cancer, increasing in the geriatric population, technological advancements, integration of AI for mammography screening, increasing popularity of 3D mammography and governmental initiatives, policies, and programs to enhance breast cancer screening. Increasing investments by public and private companies for research and development in the respective markets and collaborative ventures involving medical devices manufacturers and research institutions have spurred innovation leading to further growth of the global mammography market.

Key Players Landscape and Outlook

In the mammo gram market industry, several public and private companies are actively establishing strategic partnerships and distribution agreements to empower and strengthen resources and gain insights regarding new market and advanced technologies to expand their businesses globally. Mergers and acquisitions are being done with the aim of fostering innovation and improving product portfolios of medical device companies. For instance, in September 2023, Hologic Inc. and Bayer announced their international partnership to deliver contrast-enhanced mammography (CEM) solutions to improve breast cancer detection in multiple countries across the Canadian, European, and Asia Pacific regions. Along with breast cancer detection, this partnership also aims to assist radiologists and clinicians for providing quality medical treatment to the patients.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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