

Automated Breast Ultrasound Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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Abstracts

Automated Breast Ultrasound Market Summary

Introduction

Automated Breast Ultrasound (ABUS) systems are advanced imaging tools designed to enhance breast cancer detection, particularly in women with dense breast tissue (40%-50% of women), where mammography sensitivity drops to 50%-60%. With approximately 2.3 million new breast cancer cases annually worldwide, ABUS offers detection rates above 90%, complementing traditional screening methods. The market is driven by rising breast cancer incidence, aging populations, and growing awareness of early detection benefits. Innovations like AI integration and 3D imaging boost diagnostic efficiency by about 30%. The global market is projected to reach between USD 1.0 billion and USD 2.0 billion in 2025, with a CAGR of 9.8% to 13.5% through 2030.

Regional Analysis

North America: The U.S. leads with widespread screening programs and supplemental ultrasound recommendations, while Canada focuses on women's health initiatives.

Europe: Germany, France, and the UK drive demand due to robust healthcare systems and aging demographics.

Asia Pacific: China and India see growth from rising cancer awareness, while Japan emphasizes advanced diagnostics.

Rest of the World: Brazil expands screening access, and the Middle East invests in cutting-edge medical technologies.

Application Analysis

Hospitals: Expected growth of 9.5%-13.2%, driven by comprehensive diagnostics. Trends focus on integrated imaging systems.

Diagnostic Imaging Laboratories: Projected growth of 10.0%-13.8%, linked to specialized screening. Developments emphasize high-throughput solutions.

Others: Anticipated growth of 9.2%-12.9%, covering niche uses. Advances prioritize patient comfort.

Type Analysis

Automated Breast Volume Scanner: Expected growth of 9.7%-13.4%, valued for 3D imaging. Trends highlight volumetric data accuracy.

Automated Breast Ultrasound (ABUS): Projected growth of 9.9%-13.6%, key for dense tissue detection. Advances focus on AI enhancements.

Key Market Players

Leading companies include GE HealthCare, innovating with MyBreastAI; Philips, advancing with EPIQ systems; Siemens Healthcare, enhancing imaging solutions; CANON MEDICAL SYSTEMS CORPORATION, focusing on ultrasound tech; TELEMED Medical Systems, offering diagnostic tools; Hologic, specializing in breast health; SuperSonic Imagine, developing imaging systems; Lunit, integrating AI diagnostics; and Delphinus Medical Technologies, launching SoftVue.

Porter's Five Forces Analysis

? Threat of New Entrants: Moderate, due to high technological and regulatory barriers, though innovative startups can disrupt niches.

? Threat of Substitutes: Low, as ABUS uniquely enhances detection in dense breasts with no direct alternatives.

? Bargaining Power of Buyers: Moderate, with facilities seeking advanced yet cost-effective tools, though specialized needs limit options.

? Bargaining Power of Suppliers: Low, with multiple component suppliers available.

? Competitive Rivalry: High, with firms competing on AI integration, imaging quality, and screening efficiency.

Market Opportunities and Challenges

Opportunities:

? Breast cancer's 2.3 million annual cases and dense breast prevalence (40%-50%) drive demand.

? Aging populations (2.1 billion over 60 by 2050) and obesity increase risks, while awareness campaigns and government funding boost screening.

? AI and 3D imaging improve outcomes, and radiation-free preferences enhance adoption.

Challenges:

? High costs of ABUS systems limit penetration in low-income regions.

? Regulatory delays for AI-integrated devices slow entry.

? Limited radiologists in rural areas restrict growth.

Market News

? In July 2024, Delphinus Medical Technologies, Inc. installed SoftVue breast ultrasound tomography at West Jefferson Medical Center in Louisiana.

? In May 2022, iSono Health received US FDA clearance for the ATUSA System, a portable breast imaging system.

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