

# Digital Mammography Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (2D Full Field Digital Mammography Tomosynthesis, 3D Full Field Digital Mammography Tomosynthesis), By End-User (Hospitals, Ambulatory Surgical Centers, Other End-Users) Region and Competition

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## Abstracts

Global Digital Mammography Market has valued at USD 1.12 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 9.39% through 2028. The Global Digital Mammography Market has experienced significant growth and transformation in recent years, revolutionizing the landscape of breast cancer diagnostics. Digital mammography, a state-of-the-art imaging technology, has replaced traditional film-based mammography, offering superior image quality, enhanced diagnostic accuracy, and streamlined workflow. The market's expansion is primarily driven by the rising prevalence of breast cancer worldwide, coupled with increasing awareness and early detection initiatives. Digital mammography facilitates the detection of breast abnormalities, including tumors and calcifications, with greater sensitivity and specificity, leading to improved outcomes and reduced mortality rates.

Technological advancements in digital mammography have played a pivotal role in market evolution. Innovations such as full-field digital mammography (FFDM) and digital breast tomosynthesis (DBT) have gained prominence, providing three-dimensional imaging capabilities that offer a more comprehensive and detailed view of breast tissue. This has proven particularly beneficial in overcoming the limitations of conventional two-dimensional mammography, especially in cases involving dense breast tissue. Moreover, the integration of artificial intelligence (AI) and machine learning algorithms

has further augmented the diagnostic accuracy by assisting radiologists in the interpretation of mammographic images, reducing false positives and enhancing efficiency.

The global digital mammography market is characterized by a competitive landscape with key players investing in research and development activities to introduce cutting-edge technologies and gain a competitive edge. Geographically, North America has dominated the market, driven by the early adoption of digital mammography systems, robust healthcare infrastructure, and a high prevalence of breast cancer. However, emerging economies in Asia-Pacific and Latin America are witnessing a growing demand for digital mammography, attributed to increasing healthcare awareness, improving healthcare infrastructure, and rising disposable incomes.

## Key Market Drivers

### Increasing Prevalence of Breast Cancer

The increasing prevalence of breast cancer has become a driving force behind the growth of the global digital mammography market. Breast cancer remains one of the most common cancers globally, affecting millions of women each year. As awareness campaigns and early detection initiatives gain momentum, the demand for advanced diagnostic technologies such as digital mammography is on the rise. Digital mammography offers several advantages over traditional film-based mammography, including improved image quality, faster image acquisition, and the ability to manipulate and store digital images efficiently. These advantages are crucial in the early detection of breast cancer, enabling healthcare professionals to identify abnormalities with greater precision.

The global digital mammography market is witnessing substantial expansion as healthcare providers increasingly recognize the importance of early detection in improving treatment outcomes and reducing mortality rates associated with breast cancer. Governments and healthcare organizations worldwide are investing in screening programs and infrastructure to facilitate widespread access to digital mammography services. The integration of artificial intelligence (AI) and machine learning algorithms in digital mammography systems further enhances diagnostic accuracy, aiding radiologists in the interpretation of complex images and reducing the likelihood of false positives or negatives.

Moreover, the rising prevalence of breast cancer is prompting technological

advancements within the digital mammography market. Ongoing research and development efforts are focused on innovations such as 3D digital breast tomosynthesis, which provides a three-dimensional view of the breast, offering additional information for a more comprehensive assessment of breast abnormalities. These advancements contribute to the market's growth by addressing the limitations of traditional mammography and improving the overall diagnostic capabilities. As the global healthcare landscape continues to evolve, the digital mammography market is positioned to play a pivotal role in the fight against breast cancer. The increasing prevalence of breast cancer serves as a catalyst for technological innovation, creating a positive feedback loop where advancements in digital mammography contribute to more effective screening, early detection, and improved patient outcomes.

### Technological Advancements in Digital Mammography

Technological advancements in digital mammography are serving as a driving force behind the robust growth of the Global Digital Mammography Market. Over the years, the field has witnessed transformative innovations, such as Full-Field Digital Mammography (FFDM) and Digital Breast Tomosynthesis (DBT), which have revolutionized breast imaging. FFDM provides high-resolution digital images, offering enhanced clarity and detail compared to traditional film-based mammography. This advancement not only facilitates more accurate detection of abnormalities but also streamlines the diagnostic process with faster image processing times. Digital Breast Tomosynthesis, or 3D mammography, has emerged as a breakthrough technology, addressing the limitations of 2D imaging, particularly in cases of dense breast tissue. By capturing multiple images from various angles, DBT provides three-dimensional views, enabling healthcare professionals to navigate through breast tissue layers, improving diagnostic accuracy.

Moreover, the integration of Artificial Intelligence (AI) and Machine Learning (ML) has further propelled the technological evolution of digital mammography. AI algorithms assist radiologists in analyzing mammographic images, offering a second layer of intelligent interpretation. These algorithms can identify subtle patterns and potential abnormalities, aiding in the early detection of breast cancer. The continuous refinement of these AI tools contributes to reducing false positives and negatives, ultimately enhancing diagnostic precision. The amalgamation of AI and digital mammography not only improves accuracy but also streamlines workflow, making the diagnostic process more efficient.

The ongoing research and development initiatives in the field of digital mammography

continue to push the boundaries of technology, with a focus on improving image quality, reducing radiation exposure, and enhancing the overall patient experience. The incorporation of advanced features, such as computer-aided detection (CAD) systems, adds another layer of sophistication to digital mammography, allowing for a more comprehensive and nuanced analysis of breast images.

### Growing Awareness and Early Detection Initiatives

The Global Digital Mammography Market is experiencing a significant upswing, propelled by the growing awareness of breast health and the implementation of early detection initiatives. Increasingly, governments, non-profit organizations, and healthcare institutions are championing breast cancer awareness campaigns, underscoring the importance of regular screenings and early diagnosis. This heightened awareness has resulted in a greater emphasis on advanced diagnostic technologies, with digital mammography emerging as a key player in this landscape. As women become more proactive about their health and well-being, the demand for efficient and accurate breast cancer screening methods has risen. Digital mammography, with its superior imaging capabilities and ability to detect abnormalities at early stages, aligns seamlessly with the objectives of these awareness campaigns.

Early detection initiatives, often accompanied by advocacy programs, encourage women to undergo routine screenings for breast cancer. The accessibility and efficiency of digital mammography make it a valuable tool in reaching these objectives. The technology's ability to provide high-resolution images, facilitate faster processing times, and offer three-dimensional views through techniques like Digital Breast Tomosynthesis (DBT) has positioned it as a preferred choice for early detection efforts. Moreover, the integration of Artificial Intelligence (AI) in digital mammography enhances diagnostic accuracy, reducing the likelihood of false positives and negatives.

The global shift towards proactive healthcare, coupled with the empowerment of individuals through awareness campaigns, has translated into a growing market for digital mammography. Healthcare providers and institutions are increasingly investing in these advanced technologies to meet the rising demand for early detection services. The synergy between awareness initiatives and the capabilities of digital mammography contributes not only to the diagnosis of breast cancer but also to a broader culture of preventative healthcare.

### Key Market Challenges

## High Initial Costs and Economic Constraints

The Global Digital Mammography Market, while experiencing significant growth, grapples with a formidable challenge – the high initial costs and economic constraints associated with adopting advanced digital mammography technologies. The deployment of state-of-the-art digital mammography systems requires a substantial upfront investment, posing a barrier to accessibility, particularly in resource-constrained healthcare settings.

The technology involves cutting-edge imaging systems, often accompanied by advanced software for image processing and analysis. While these innovations contribute to superior diagnostic accuracy and improved patient outcomes, they come at a considerable price. Healthcare institutions, especially those in developing regions, often face budgetary constraints that make it challenging to allocate funds for such high-cost investments.

Addressing this challenge requires a multifaceted approach. Collaboration between governments, healthcare institutions, and technology providers is crucial in developing innovative financial models and funding mechanisms. Public-private partnerships can play a pivotal role in facilitating the acquisition of digital mammography systems, ensuring that the financial burden is shared and that the benefits of advanced breast cancer detection technologies are extended to a broader spectrum of the population.

Furthermore, the industry must explore avenues for cost reduction without compromising the quality of care. Research and development efforts focused on developing more cost-effective digital mammography solutions can pave the way for affordable alternatives. This could involve innovations in manufacturing processes, materials, or even the integration of open-source technologies to reduce licensing and operational costs.

## Radiation Exposure Concerns

Radiation exposure concerns stand as a significant obstacle in the path of the Global Digital Mammography Market. While digital mammography has proven instrumental in early breast cancer detection, anxieties regarding ionizing radiation persist among both healthcare professionals and patients, posing challenges to widespread acceptance and adoption.

Traditional mammography involves the use of ionizing radiation to create detailed

images of breast tissue. While the radiation dose is generally considered low and safe, the cumulative effects of repeated exposure during routine screenings have prompted concerns. Patients, already grappling with the emotional burden of potential cancer diagnoses, are increasingly mindful of the long-term health implications associated with radiation exposure. This heightened awareness has led to a demand for alternative imaging technologies that offer diagnostic precision without compromising safety.

In response to these concerns, the industry has been actively exploring ways to minimize radiation exposure without sacrificing the diagnostic efficacy of digital mammography. Ongoing research and development efforts focus on developing low-dose imaging technologies, aiming to strike a delicate balance between obtaining high-quality diagnostic images and ensuring patient safety. Innovations in detector technology, image processing algorithms, and dose modulation techniques are continuously evolving to address radiation-related apprehensions.

Moreover, advocacy for adherence to dose optimization principles and guidelines has gained prominence within the medical community. Healthcare providers are encouraged to employ techniques that tailor radiation doses to individual patient characteristics, ensuring that the benefits of early breast cancer detection outweigh potential risks. Standardization of protocols and the establishment of guidelines for radiation dose management contribute to a more systematic and controlled approach to addressing radiation exposure concerns.

## Key Market Trends

### Rise of 3D Mammography (Digital Breast Tomosynthesis)

The rise of 3D mammography, also known as digital breast tomosynthesis (DBT), has emerged as a transformative force propelling the global digital mammography market to new heights. Digital breast tomosynthesis represents a significant advancement over traditional 2D mammography by providing a three-dimensional view of the breast tissue. This revolutionary technology allows radiologists to examine the breast in multiple thin slices, offering a more detailed and comprehensive assessment of abnormalities. As breast cancer detection and diagnosis become increasingly sophisticated, the demand for 3D mammography has surged, driven by its ability to improve the accuracy of breast cancer screenings.

One of the key factors contributing to the growth of the global digital mammography market is the enhanced diagnostic capabilities offered by 3D mammography. This

technology reduces the limitations associated with overlapping breast tissue in traditional 2D mammography, leading to a reduction in false positives and false negatives. The improved accuracy translates to better-informed clinical decisions, ensuring that potential abnormalities are identified more precisely. As a result, 3D mammography is becoming the standard of care in breast cancer screening, further driving its adoption and contributing to the overall expansion of the digital mammography market.

Moreover, the rise of 3D mammography aligns with a broader trend of technological integration within the healthcare sector. The incorporation of artificial intelligence (AI) algorithms into 3D mammography systems enhances the interpretation of images, aiding radiologists in detecting subtle abnormalities and streamlining the diagnostic process. The synergy between 3D mammography and AI not only improves the efficiency of breast cancer screenings but also augments the capabilities of healthcare professionals in identifying and addressing potential issues at an earlier stage.

#### Integration of Artificial Intelligence (AI) and Machine Learning (ML)

The integration of Artificial Intelligence (AI) and Machine Learning (ML) is playing a pivotal role in boosting the global digital mammography market, revolutionizing the landscape of breast cancer detection and diagnosis. AI and ML algorithms have become indispensable tools in enhancing the capabilities of digital mammography systems, offering a sophisticated layer of intelligence to the interpretation of mammographic images. One of the key advantages is the ability of these technologies to analyze vast datasets quickly and accurately, assisting healthcare professionals in identifying subtle patterns and anomalies that may be indicative of breast cancer.

The utilization of AI and ML in digital mammography significantly contributes to improving diagnostic accuracy and efficiency. These technologies can assist radiologists in distinguishing between benign and malignant lesions, reducing the incidence of false positives and false negatives. By leveraging the power of machine learning, digital mammography systems can continuously learn and adapt, refining their diagnostic capabilities over time. This adaptive nature ensures that the technology remains at the forefront of breast cancer detection, constantly evolving to meet the demands of an ever-changing healthcare landscape.

Furthermore, AI and ML algorithms bring automation to the interpretation process, enabling faster and more standardized assessments of mammographic images. This not only enhances the speed of diagnosis but also promotes consistency across

different healthcare settings. The ability of these technologies to handle complex data sets and identify subtle patterns that may escape the human eye empowers healthcare professionals with a valuable tool for early detection and intervention. The global digital mammography market is witnessing a surge in demand for AI and ML-integrated solutions as healthcare providers recognize the transformative impact on patient outcomes. Governments and institutions are increasingly investing in the implementation of these technologies to improve breast cancer screening programs and reduce the burden on healthcare systems.

### Segmental Insights

#### Product Insights

Based on the Product, 3D Full Field Digital Mammography Tomosynthesis emerged as the dominant segment in the global market for Global Digital Mammography in 2022. The primary reason for the high demand for 3D DBT lies in its ability to address some limitations associated with traditional 2D FFDM. While 2D mammography provides valuable information for breast cancer screening, it may encounter challenges in cases involving dense breast tissue. Dense breasts can sometimes obscure abnormalities, leading to false negatives or inconclusive results.

#### End-User Insights

Based on the End-User, hospitals emerged as the dominant segment in the global market for Global Digital Mammography Market in 2022. Hospitals are key institutions that provide a wide range of healthcare services, including diagnostic imaging. Digital mammography is a critical tool for breast cancer screening and diagnosis, making it an integral part of the services offered by hospitals. Many hospitals have specialized breast health centers within their facilities. These centers focus specifically on breast imaging, screening, and diagnosis. Given the importance of mammography in breast cancer detection, hospitals with dedicated breast health centers are significant contributors to the demand for digital mammography systems.

#### Regional Insights

North America emerged as the dominant player in the Global Digital Mammography Market in 2022, holding the largest market share. North America, particularly the United States, is known for its early adoption of advanced healthcare technologies. The region often serves as an early adopter for cutting-edge medical imaging equipment, including



digital mammography systems. The well-developed healthcare infrastructure in North America, including a network of hospitals, clinics, and imaging centers, supports the widespread adoption of digital mammography. Accessibility to advanced healthcare services contributes to the market's growth in the region.

### Key Market Players

Hologic Inc

GE Healthcare

Koninklijke Philips NV

Siemens Healthcare GmbH

Fujifilm Corporation

Planmed Oy

Toshiba Medical Systems

Metaltronica S.p.A

### Report Scope:

In this report, the Global Digital Mammography Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Digital Mammography Market, By Product:

2D Full Field Digital Mammography Tomosynthesis

3D Full Field Digital Mammography Tomosynthesis

Global Digital Mammography Market, By End-User:

Hospitals

Ambulatory Surgical Centers

Other End-Users

Global Digital Mammography Market, By Application:

Clinical

System

Global Digital Mammography Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Digital Mammography Market.

## Available Customizations:

Global Digital Mammography Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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