+357 96 030922
info@marketpublishers.com

India Mammography Market By Product (Film Screen Systems, Digital Systems, Analog Systems, 3D Systems), By Technology (Breast Tomosynthesis, CAD Mammography, Digital Mammography), By End Use (Hospitals & Clinics, Cancer Care Centers, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

The India Mammography Market was valued at USD 47.70 million in 2024 and is projected to reach USD 102.41 million by 2030, growing at a compound annual growth rate (CAGR) of 13.54% during the forecast period. This growth is driven by key factors such as rising awareness of breast cancer, advancements in diagnostic technologies, and expanding healthcare infrastructure. As health consciousness increases and government initiatives support early detection, more women are opting for regular screenings. Digital technologies, including 3D mammography, are gaining popularity due to their higher image quality, lower radiation exposure, and faster results, all of which are fueling market expansion. Furthermore, the growing geriatric population and improved access to health insurance are contributing to market growth. However, challenges such as the high cost of advanced mammography equipment, limited access to screening in rural areas, and a shortage of trained professionals continue to impede widespread adoption.

Despite these challenges, demand for mammography services remains strong, particularly in regions with better healthcare facilities, such as Southern India, where awareness and access to advanced technologies are more widespread. As the healthcare landscape continues to evolve, the Indian mammography market is positioned for continued growth, though addressing affordability and accessibility

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challenges will be crucial for its sustained development.

Key Market Drivers

Expansion of Healthcare Infrastructure The growth of healthcare infrastructure in India is a major driver of the mammography market. As healthcare facilities expand, there is an increasing number of institutions and professionals dedicated to cancer detection. This expansion ensures greater access to mammography services, particularly in rural and semi-urban areas. The availability of more healthcare centers and specialized personnel supports the adoption of advanced technologies, such as digital and 3D mammography systems. As of March 31, 2023, India had 169,615 Sub-Centres (SCs), 31,882 Primary Health Centres (PHCs), 6,359 Community Health Centres (CHCs), 1,340 Sub-Divisional/District Hospitals (SDHs), 714 District Hospitals (DHs), and 362 Medical Colleges (MCs), which together ensure widespread access to medical services, including early breast cancer screenings. This network drives market growth nationwide.

Key Market Challenges

Limited Access to Screening in Rural and Remote Areas A significant challenge in the Indian mammography market is the limited availability of screening facilities in rural and remote areas. Despite urban healthcare expansion, many rural regions still lack sufficient diagnostic services. As a result, a large portion of the population, especially in underserved areas, faces barriers to early breast cancer detection. This challenge is compounded by a lack of trained medical professionals, limited awareness about the importance of mammography, and logistical issues, such as long travel distances to the nearest healthcare facility. These barriers hinder the effectiveness of early detection programs, resulting in delayed diagnoses, which negatively impact treatment outcomes and survival rates. To overcome this, increased investment in healthcare services, mobile screening units, and awareness campaigns in these regions is essential.

Key Market Trends

Technological Advancements Technological advancements are shaping the Indian mammography market by enhancing the efficiency, accuracy, and accessibility of breast cancer detection. The growing demand for advanced diagnostic tools has led to the adoption of cutting-edge mammography systems across healthcare facilities. Digital mammography, for example, offers superior image quality, faster processing times, and reduced radiation exposure compared to traditional film-based systems. These systems also enable better detection of abnormalities, such as small tumors, and simplify image

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storage and retrieval.

The rise of 3D mammography, or tomosynthesis, is another significant advancement. By providing high-resolution images in layers, 3D mammography improves the accuracy of detection by allowing radiologists to examine the breast tissue from multiple angles. This technology reduces false positives and negatives, minimizing unnecessary follow-ups and biopsies. As adoption increases, 3D mammography is expected to become a dominant feature of the Indian market.

Additionally, advancements in artificial intelligence (AI) and machine learning (ML) are enhancing mammography services. AI systems can assist radiologists by detecting abnormalities in mammograms, highlighting areas of concern, and offering second opinions. These AI tools have the potential to reduce human error, speed up interpretation, and facilitate earlier breast cancer detection, thus improving the overall efficiency of mammography services.

Key Market Players

Hologic Inc.

Analog Devices India Private Limited

Canon India Pvt. Ltd.

FUJIFILM India Private Limited

Siemens Healthcare Private Limited

Toshiba India Private Limited

GE HealthCare Pvt Ltd.

Koninklijke Philips NV

Market Segmentation

The India Mammography Market has been segmented as follows:

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By Product:

Film Screen Systems

Digital Systems

Analog Systems

3D Systems

By Technology:

Breast Tomosynthesis

CAD Mammography

Digital Mammography

By End Use:

Hospitals & Clinics

Cancer Care Centers

Others

By Region:

East India

West India

North India

South India

Competitive Landscape Company profiles provide detailed analysis of the major players in the India Mammography Market.

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Available Customizations The India Mammography Market report offers the following customization options to meet specific business needs:

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

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