

Mammography Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product Type (Full-field Digital Mammography, Film-screen Mammogram, Breast Tomosynthesis), By Technology (Digital v/s Analog), By End User (Hospitals & Clinics, Diagnostic Centers, Others), By Region and Competition

<https://marketpublishers.com/r/M8AD52820CF7EN.html>

Date: October 2023

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: M8AD52820CF7EN

Abstracts

Global Mammography Devices Market has valued at USD 3021.23 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.69% through 2028. Mammography devices are medical devices that use low-dose X-rays to examine the breast architecture and diagnose breast cancer. It's a minimally invasive screening technique that can detect breast cancer before symptoms appear.

Mammography Devices uses various approaches such as computer-aided detection, digital mammography, and breast tomosynthesis. It is commonly used to screen patients showing signs of breast cancer like lumps or discomfort. During mammography, the patient's breast is placed on a support plate and compressed with a paddle while a burst of X-rays passes through to a detector. The resulting mammograms capture images of the breast tissue, with low-density tissues appearing translucent and dense tissues or tumors appearing white. Invasive breast cancer affects approximately one in eight women in the United States, with around 266,120 women diagnosed in 2018. Additionally, about 2,550 men will be affected by invasive breast cancer in the same year (NCBI).

Key Market Drivers

Growing Burden of Breast Cancer

The growing burden of breast cancer is increasing the demand for mammography devices, as early detection and accurate diagnosis are paramount in the battle against this pervasive disease. Breast cancer is one of the most common forms of cancer among women worldwide, and its incidence continues to rise. In response to this alarming trend, mammography has emerged as an essential tool for screening and diagnosing breast cancer at its earliest and most treatable stages.

The demand for mammography devices has also been fueled by the increasing awareness of the benefits of early detection and the continuous advancements in imaging technology. Innovations like 3D mammography provide clearer and more detailed images, reducing the likelihood of false positives and false negatives. Additionally, the development of more comfortable and patient-friendly Mammography Devices has encouraged more women to undergo regular screenings, further contributing to the demand for these devices.

The growing burden of breast cancer has placed a heightened emphasis on the need for effective and accessible screening methods. Mammography devices have emerged as vital tools in the fight against breast cancer, and their demand is expected to continue rising as healthcare systems globally strive to improve early detection rates, reduce mortality, and enhance the overall quality of care for breast cancer patients.

Technological Advancements in the Field of Breast Imaging

Technological advancements in the field of breast imaging are driving an increased demand for mammography devices, revolutionizing the way breast cancer is detected and diagnosed. These innovations are essential in improving the accuracy, efficiency, and patient experience associated with breast screenings. Digital mammography represents a significant leap forward from traditional film-based systems. It provides clearer and more easily manipulated images, reducing the need for retakes and enabling radiologists to detect abnormalities with greater precision. Moreover, the integration of computer-aided detection (CAD) software with digital mammography has enhanced the diagnostic capabilities by helping identify subtle lesions that might be overlooked by human eyes.

The introduction of 3D mammography, or tomosynthesis, has been a game-changer in breast imaging. This technology creates three-dimensional images, allowing radiologists to examine breast tissue layer by layer. This significantly reduces the incidence of false positives and false negatives, leading to more accurate diagnoses and fewer

unnecessary follow-up tests.

Technological advancements have also led to improvements in patient comfort during mammography procedures. Ergonomically designed mammography devices and softer compression techniques have made the experience less painful and intimidating for women, encouraging more frequent and timely screenings. Furthermore, the integration of artificial intelligence (AI) into mammography is poised to further transform breast imaging. AI algorithms can assist radiologists in detecting subtle abnormalities, streamline workflow, and reduce interpretation time, making the entire process more efficient.

Increasing Mature Markets

Most of the growth in the global mammography market can be attributed to the mature markets of Western Europe, North America, South Korea, and Japan. These markets have well-established breast cancer screening programs that are adequately funded and reimbursed. Additionally, they boast a relatively high level of awareness, participation, and coverage when it comes to breast cancer screening.

One key factor contributing to the growth of these mature markets is the presence of a large installed base of equipment. As a result, purchases in these markets are often cyclical, aimed at replacing outdated equipment. However, it is worth noting that the year 2018 witnessed a unique trend in these markets. The demand for replacement equipment reached its peak due to a combination of factors.

During this period, there was an increase in breast cancer incidence and mortality rates, which coincided with improved awareness, coverage, and participation in breast cancer screening programs. This led to a surge in demand for new Mammography Devices. Moreover, stronger economies in these regions resulted in increased funding for healthcare providers. As a result, they were able to replace outdated systems with more advanced Mammography Devices, thereby driving uncharacteristically high growth in the mature mammography markets.

Investment from Various Organizations in Breast Cancer Screening Campaigns

Government sponsorship of mammography, primarily through the implementation of breast cancer screening programs, plays a significant role in shaping a nation's mammography market in terms of size and development. However, it is important to note that not all screening programs have equal impact on the market. Generally,

nations with well-established screening programs tend to have larger and more mature mammography markets, whereas the absence of such programs results in smaller emerging markets. The unique needs and demands of their respective breast cancer screening programs contribute to the growth of mature and emerging mammography markets, thus influencing global mammography revenue. The increasing investment from various organizations in breast cancer screening campaigns is playing a pivotal role in driving up the demand for mammography devices. Breast cancer remains a significant global health concern, and organizations, both public and private, recognize the importance of early detection as a cornerstone in the fight against this disease.

Investments in breast cancer screening campaigns are primarily aimed at raising awareness and encouraging women to undergo regular mammography screenings. These campaigns often include educational initiatives, outreach programs, and advocacy efforts to emphasize the importance of early detection and the benefits of mammography in improving survival rates. As a result, more women are becoming aware of the necessity of regular breast screenings, which directly contributes to the increased demand for mammography devices. Furthermore, research organizations and charities invest in cutting-edge technologies and research to enhance the sensitivity and accuracy of mammography devices. This encourages the development and adoption of advanced Mammography Devices, such as digital mammography and 3D tomosynthesis, which further stimulates demand as healthcare providers seek to offer the latest and most effective breast imaging solutions to their patients.

Investment from various organizations in breast cancer screening campaigns is instrumental in raising awareness, improving accessibility, and advancing technology in the field of breast imaging. This collective effort significantly increases the demand for mammography devices, as more healthcare facilities strive to provide state-of-the-art breast cancer screening services to their communities, ultimately leading to earlier detection and improved outcomes for breast cancer patients.

Key Market Challenges

Reduction in Reimbursement

The reduction in reimbursement rates for mammography services is having a negative impact on the demand for mammography devices. Mammography is a critical tool in the early detection of breast cancer, and its accessibility is crucial for ensuring that women receive timely and effective screening. When reimbursement rates decrease, it creates several challenges that can deter healthcare providers from investing in or maintaining

mammography devices. Reduced reimbursement rates directly affect the financial viability of offering mammography services. Healthcare facilities often rely on reimbursements from government programs and private insurers to cover the costs associated with Mammography Devices, staffing, maintenance, and overhead. When reimbursement rates are lowered, it can lead to financial losses for providers, making it less economically feasible to maintain or invest in modern mammography technology.

Lower reimbursement rates may lead to a reduction in the number of facilities offering mammography services. Smaller healthcare providers and clinics, in particular, may find it increasingly difficult to sustain mammography programs under reduced reimbursements, potentially limiting access to screenings for women in underserved or rural areas. Moreover, decreased reimbursement rates may discourage healthcare providers from investing in advanced mammography technology, such as 3D tomosynthesis or digital mammography, which can improve the accuracy of breast cancer detection. Providers may opt for older, less costly equipment that may not offer the same level of diagnostic capability.

Risk of Adverse Effects from Radiation Exposure

The risk of adverse effects from radiation exposure is a significant factor contributing to concerns and, in some cases, a decrease in the demand for mammography devices. While mammography is an invaluable tool for breast cancer screening and early detection, the exposure to ionizing radiation during the procedure has raised apprehensions among patients and healthcare providers.

One primary concern is the cumulative radiation dose over a woman's lifetime, especially for those who undergo routine mammograms. Prolonged exposure to ionizing radiation carries a potential risk of causing DNA damage and an increased likelihood of cancer development, albeit at relatively low levels. This heightened awareness of radiation risks has prompted some individuals to question the frequency of mammography screenings, potentially reducing demand for the service.

Additionally, women who may be particularly sensitive to radiation or have a higher genetic predisposition to radiation-induced cancers may express reluctance to undergo mammography. This can deter healthcare providers from recommending mammograms and, subsequently, impact the demand for mammography devices. While the risk of adverse effects from radiation exposure is a valid concern associated with mammography, advances in technology have helped mitigate these worries to some extent. The adoption of lower-dose mammography options is crucial in maintaining

confidence in the safety of breast cancer screenings, thereby ensuring that the demand for mammography devices remains steady and that women continue to receive the benefits of early breast cancer detection.

Key Market Trends

AI and Computer-Aided Detection (CAD)

Artificial intelligence and machine learning algorithms are being integrated into mammography devices to aid radiologists in identifying abnormalities and improving the accuracy of interpretations. AI-powered CAD systems will likely become more advanced, helping to streamline the reading process and reducing interpretation errors. AI algorithms are trained on large datasets of mammograms to learn patterns associated with normal and abnormal breast tissue. These algorithms can detect subtle changes, microcalcifications, masses, or architectural distortions that might be indicative of cancer. They analyze the mammography images pixel by pixel, identifying areas that warrant closer inspection.

AI-driven CAD systems can significantly reduce false positives and false negatives. False positives can cause unnecessary anxiety and follow-up procedures, while false negatives can lead to missed cancer diagnoses. AI can help radiologists pinpoint potential abnormalities more accurately, reducing these errors. AI-powered CAD systems can help radiologists streamline their workflow. They can highlight areas of concern on the mammogram, making it quicker for radiologists to review the images and focus their attention on regions that may require further evaluation. This efficiency can lead to faster interpretation of mammograms. AI and machine learning are transforming mammography by improving the accuracy of interpretation, reducing errors, and enhancing radiologists' workflow. As these technologies continue to advance, they are likely to become an integral part of breast cancer screening, ultimately leading to earlier detection and improved outcomes for patients.

Portable and Point-of-Care Mammography

Smaller, portable mammography devices and point-of-care systems will become more prevalent, enabling screenings in non-traditional settings like mobile clinics and remote healthcare facilities. These devices will be especially valuable in increasing access to mammography in resource-constrained areas. Portable mammography devices are designed to be compact and lightweight, making them easy to transport. This mobility allows healthcare providers to take mammography services to remote or underserved

regions where access to traditional healthcare facilities may be limited.

These devices are ideal for use in mobile healthcare clinics or vans, which can travel to rural or remote communities. Mobile clinics equipped with portable mammography units can provide on-site breast cancer screenings, eliminating the need for patients to travel long distances for a mammogram. Portable mammography devices are well-suited for use in smaller, remote healthcare facilities that may lack the space or infrastructure for larger, fixed mammography machines. These devices can be set up in primary care clinics, community health centers, or even temporary medical camps.

Portable mammography systems typically require less infrastructure and shielding compared to their larger, fixed counterparts. This can significantly reduce the cost of setting up and maintaining a mammography facility, making it more feasible for resource-constrained areas to offer breast cancer screening services. The ability to conduct mammography screenings in non-traditional settings means that women in underserved areas are more likely to receive timely breast cancer screenings. Early detection is crucial for improving outcomes, and portable devices help bridge the gap in access to healthcare. Portable mammography devices can also be invaluable during disaster response efforts. In the aftermath of natural disasters or humanitarian crises, they can be quickly deployed to ensure that breast cancer screenings continue for affected populations.

Segmental Insights

Technology Insights

Based on technology, the market is segmented into digital and analog. The digital mammography segment is projected to capture a larger market share in the forecast period. Digital mammography, an advanced and specialized form of mammography, utilizes digital computers and receptors instead of X-ray films to examine breast tissue for cancer indicators. Technological advancements have spurred the emergence of digital mammography, offering advantages such as superior depiction of low-contrast objects, improved diagnostic image quality, and wider dynamic range. With a growing number of healthcare facilities adopting these modern systems, they also facilitate easy sharing of soft-copy image displays and soft-copy reading across devices. These factors have made digital mammography a favored choice among healthcare providers, while also ensuring significantly lower radiation exposure compared to conventional systems.

End User Insights

Based on the end user segment, hospitals and clinics dominated the end user segment in 2022, accounting for approximately 45.6% of the total revenue. The presence of mammography facilities within hospitals can have a positive impact on various factors, including hospital stay duration, healthcare cost, care quality, and emergency care availability. For example, in September 2019, Parkside Hospital in Wimbledon installed a 3Dimensions mammography system from Hologic, enabling high-resolution breast tomosynthesis.

Large hospitals typically have in-house mammography facilities, but the need for substantial investments, frequent maintenance, adequate space, and skilled professionals can pose entry barriers. This can burden hospitals in managing their medical imaging facilities. To alleviate this burden and expand the reach of their services, hospitals can establish partnerships with diagnostic centers to provide medical imaging facilities.

The diagnostic centers segment is expected to experience significant growth during the forecast period, driven by increased awareness about breast cancer. This has led to a surge in demand for mammography procedures for diagnosis, treatment planning, and prevention of breast cancer. The availability of advanced mammography services in diagnostic centers in developed and developing economies, such as the United States, Germany, the United Kingdom, Japan, China, and India, is anticipated to drive the overall segment's growth.

Regional Insights

North America currently dominates the Mammography Devices market and are expected to maintain this position in the foreseeable future. Leading firms consistently strive to develop technologically advanced solutions and address the increasing incidence of breast cancer in the region. Governments are making significant investments in establishing camps and free check-up facilities to detect breast cancer, aiming to mitigate the severity of the situation. In the United States, market participants are expanding their consumer bases through numerous collaborations and acquisitions, contributing to the industry's expansion.

The Asia Pacific region is witnessing a rapid growth in the market for Mammography Devices. This can be attributed to the surging incidence of breast cancer, the expansion of healthcare systems, the availability of a large number of oncologists, and the rapid

economic growth of countries such as Japan and India. Governments in the region are taking initiatives to raise awareness about cancer and its impact on life by organizing various camps. For instance, the Japan Society of Breast Health, J. POSH, and the Japan Cancer Society (Smile Fund) receive donations from Wacoal Corp., which also sponsors the Pink Ribbon Fitting Campaign.

Key Market Players

Hologic, Inc.

Fujifilm Holdings Corporation

Philips Healthcare

Siemens Healthineers AG

GE Healthcare

Carestream Health, Inc.

Konica Minolta Inc.

Delphinus Medical Technologies, Inc.

Analogic Corporation

KUB Technologies, Inc.

Report Scope:

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

Mammography Devices Market, By Product Type:

Full-field Digital Mammography

Film-screen Mammogram

Breast Tomosynthesis

Mammography Devices Market, By Technology:

Digital

Analog

Mammography Devices Market, By End User:

Hospitals & Clinics

Diagnostic Centres

Others

Mammography Devices 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 Mammography Devices Market.

Available Customizations:

Global Mammography Devices 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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