

Argentina Mammography - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Argentina Mammography Market is expected to register a CAGR of 9.10% during the forecast period(2024-2029).

Key Highlights

-The COVID-19 pandemic had a substantial impact on the market studied. During the initial phase of the pandemic, Argentina's GDP growth had shrunk by 9.9% because of COVID-19. Two fundamental examinations, namely, breast ultrasounds and mammograms, were severely impacted because of the curbs and restrictions imposed on the closure of diagnostic 9.9% because of COVID-19. Two fundamental examinations, namely, breast ultrasounds and mammograms, were severely impacted because of the curbs and restrictions imposed on the closure of diagnostic and screening centers across Argentina. Patients hesitated for diagnostic and rehabilitation procedures due to the fear of infection. Thus, due to the COVID-19 pandemic, the market faced a slight setback owing to the delay in diagnosis, unavailability of screening facilities, and no remunerations offered by the state governments.

-However, during the pandemic's later phases, many patients with breast cancer were infected with COVID-19. For instance, according to a study published in the Journal of Clinical Images and Medical Case Reports in February 2023, when a retrospective multicentre study in five different health medical centers in two cities in Argentina was conducted among cancer patients with severe COVID-19, breast cancer was found more prevalent (24%) among the COVID-19 patients. Hence, it increased the demand for mammography screening. In addition, as lockdowns and restrictions were relaxed, there was an increase in demand for mammography services during the current times. This is expected to contribute to the growth of the mammography market within the country over the forecast period.

-The major factors affecting the market's growth are the increasing prevalence of cancer, the aging population, and increasing awareness urging people to have early screening.

-Furthermore, a research study conducted in July 2021 to investigate the cost-effectiveness of tele-mammography for at-risk

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Argentinian women aged 40 and above concluded that adopting tele-mammography within the country is expected to increase breast cancer detection with higher sensitivity. As a result, this would increase women's access to breast cancer screenings, decreasing mortality associated with it. Additionally, In October 2022, more than 30 Argentine non-profit organizations in cancer awareness postponed World Breast Cancer Day within the framework of an awareness campaign on the need to stop postponing annual breast exams. They continued to postpone it day after day for two weeks to create awareness among the target population and generate a strong impact in the media. Hence, all these aforementioned factors are expected to drive the market growth in Argentina over the forecast period.

Argentina Mammography Market Trends

Diagnostic Centers to Hold Significant Share in End-User Segment

- The need for mammography systems is increasing in diagnostic centers and is growing due to the high burden of breast cancer cases and more product launches of mammography devices for diagnostics. Additionally, awareness programs are also expected to boost the segment's growth.
- Many diagnostic centers offer screening services for breast cancer in Argentina. For instance, a renowned healthcare organization, Centro Rossi, in Argentina, with 13 locations around Greater Buenos Aires, integrated the Exa Enterprise Imaging Platform across all its facilities in recent years. Konica Minolta signed an agreement with Habitat Evolution to market the Exa Enterprise Imaging Platform throughout Argentina. Hence, the implementation of such steps by diagnostics centers in Argentina is expected to enhance the growth of the segment studied in Argentina.
- In addition, to improve both early detection of the disease and access to treatment, Argentina's National Cancer Institute (NCI) launched the National Cancer Control Plan in April 2021, which is a set of strategies centered around the World Health Organization (WHO) guidelines to help people prevent and cope with the disease. With the implementation of such plans, the country is witnessing a higher number of women visiting diagnostic centers to get checked for breast cancer. This is driving the demand for mammography screening and the availability of devices in diagnostic centers and creating opportunities for the segment's growth. Hence, due to the above-mentioned developments and the availability of guidelines for breast cancer screening in Argentina, the demand for diagnostic centers is increasing and fueling the segment's growth.

Digital Systems Segment is Expected to Drive the Segment Growth Over the Analysis Period

- The digital mammography systems segment is expected to witness growth during the analysis period and contribute to the overall market growth. The segment is predicted to grow due to its benefits and the availability of various products by major companies in Argentina.
- Digital mammography, also called full-field digital mammography (FFDM), is a mammography system in which the X-ray film is replaced by solid-state detectors that convert X-rays into electrical signals used to produce images of the breast that can be seen on a computer screen and can be modified to increase resolution and contrast of the image. In addition, as the clearer image improves interpretation, making it easier to view dense breast tissue and small tumors and eliminating the need for additional follow-up imaging, physicians often prefer digital systems. Hence, the highly prevalent breast cancer-affected population opts for digital systems, which is expected to drive segment growth.
- Furthermore, the presence of market players offering digital mammography in the country is another factor expected to fuel the segment's growth. For instance, the digital mammography systems offered by Siemens Healthineers, one of the key players in the studied market, enable up to 30% low doses of media without compromising image quality. Some of the products of the company enable 3D visualization of the entire breast with its unique 50 wide-angle technology and save time with single-touch positioning.

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Hence, product availability of products in the segment is predicted to fuel the market's growth over the next few years in Argentina.

Argentina Mammography Industry Overview

The Argentina mammography market is a consolidated one, owing to the presence of a few major players in the market. The major market players are focusing on technological advancements and reducing the side effects of the procedures. Some of the major players in the market are Canon Medical Systems Corporation, Fujifilm Corporation, GE Healthcare, Hologic Inc., Koninklijke Philips NV, and Siemens Healthineers.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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