

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

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Report description:

The Brazil Mammography Market size is estimated at USD 44.97 million in 2024, and is expected to reach USD 70.09 million by 2029, growing at a CAGR of 9.28% during the forecast period (2024-2029).

The COVID-19 pandemic has directed the requirement for health services adjustments that have compromised the management of other major diseases. For cancer patients, interruptions have drastically damaged the outcomes in some circumstances. The impact of the COVID-19 pandemic on cervical and breast cancer diagnosis and treatment procedures contrasted to the same time before the pandemic was substantial. The amount of breast cancer identifications owing to screening tests also reduced during the pandemic. These reductions confirm the long-term deleterious impacts of the COVID-19 pandemic on breast cancer patients in Brazil.

On account of temporary closures of National Breast Screening Programs, the country witnessed a drop in mammography procedures. Furthermore, the Brazilian National Health Agency (Agencia Nacional de Saude - ANS) announced the postponement of procedures, exams, and visits that were considered to be non-urgent during the lockdown in the year 2020. This greatly impacted the breast screening services across Brazil. For instance, in the city of Fortaleza, Brazil mammogram screening witnessed a decline of approximately 95% in 2020. Additionally, according to a Brazilian public health system cross-sectional study, a decrease in mammography procedures of around 42% was registered across the country from the year 2019 to the year 2020.

The major factors influencing the market growth in Brazil includes growing burden of Breast cancer and rising technological advancements in the field of breast imaging.

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Breast cancer is becoming one of the leading causes of death in the women population of Brazil. The country already has the highest incidence of breast cancer in the South American region. According to the estimates of GLOBOCAN, there are around 88,492 new cases and 20,725 deaths reported due to breast cancer in Brazil. The high burden of breast cancer is expected as many patients seek treatment at hospitals where mammography screening is done. This is expected to boost the market growth during the forecast period.

Brazil Mammography Market Trends

Breast Tomosynthesis is Expected to Witness Healthy Growth Over the Forecast Period

Breast tomosynthesis, also known as Digital breast tomosynthesis (DBT)/3D mammography, is a new technology that helps in improving the radiologist's ability to diagnose breast cancer. These types of mammography use a series of two-dimensional images to build a three-dimensional image of the breast. The growing demand for advanced mammography systems in the country is increasing the launches and research on the same boosting the segment growth.

Rodrigo Rosa Giampietro, in the article, 'Accuracy and Effectiveness of Mammography versus Mammography and Tomosynthesis for Population-Based Breast Cancer Screening: A Systematic Review and Meta-Analysis,' published in 2020, stated that the use of DBT with digital or synthetic mammography for women attending population-based breast cancer screenings increases the rates of overall and invasive breast cancer detection.

B. Trapp, in the article, 'Brazilian experience on the use of digital breast tomosynthesis, allied to conventional mammography, as a strategy for breast cancer screening in Brazil: focusing on patients with dense breasts,' published in 2020, stated that DBT is an imaging modality with great potential benefits in the screening of breast cancer, especially in patients with dense breasts. Many studies like this have shown that the implementation of DBT as a screening method has allowed a greater detection of breast cancer, mainly by reducing the overlap of fibro glandular tissue.

The rapidly expanding economy is expected to drive the healthcare sector in Brazil, which in turn will supplement the segment growth.

Brazil Mammography Industry Overview

The Brazil 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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