

Europe Breast Cancer Screening Tests - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Breast Cancer Screening Tests Market size is estimated at USD 0.83 billion in 2024, and is expected to reach USD 1.26 billion by 2029, growing at a CAGR of 8.68% during the forecast period (2024-2029).

COVID-19 impacted the breast cancer screening tests market in the initial phases owing to the cancellations of elective procedures, including diagnostic imaging tests. For instance, an article published in the British Journal of Cancer in February 2022 stated that population breast screening services in England were suspended during the COVID-19 pandemic. Also, an article published in the British Journal of Cancer in November 2022 reported that all breast cancer screening centers in England paused routine screening invitations during the initial months of COVID-19. As per the same source, a reduction of 23% was observed in breast cancer diagnosis in 2021 and 2% higher in 2021-22 in England as compared to the year before the pandemic. However, the market started recovering since the restrictions were lifted and diagnostic imaging tests resumed. The market is expected to register a stable growth rate during the forecast period owing to the rising government initiatives to boost breast cancer screening in the European region.

The studied market is expected to grow during the forecast period owing to the growing incidence of breast cancer, government initiatives for early detection of breast cancer, and increasing clinical trial developments and technological advancements in tests.

The high burden of breast cancer in Europe is expected to boost the demand for breast cancer screening tests during the forecast period. For instance, according to the European Breast Cancer Coalition 2022 report, 1 in 11 women in the European Union develop breast cancer before the age of 74. Also, according to 2021 statistics published by Breast Cancer Now, it has been observed that about 55,000 women are diagnosed with breast cancer in the United Kingdom every year. The same source reported that 46,000 people are diagnosed with breast cancer in England every year, followed by 4,700 in Scotland, 2,800 in

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Wales, and 1,500 in Northern Ireland. Thus, the high burden of breast cancer in the European region is expected to accelerate the demand for breast cancer screening tests, thereby propelling the market growth during the forecast period.

Furthermore, the rising clinical trials for the development and evaluation of screening tests are also contributing to the market growth. For instance, according to clinicaltrials.gov, a clinical trial sponsored by the University Medical Center, Utrecht, Netherlands, is expected to be completed by April 2023. The objective of this study is to determine the cost-effectiveness of biennial screening with mammography and MRI compared to mammography alone in women aged 50-75 years who show more than 75% mammographic density. The rising clinical trials are expected to create an opportunity for market players to develop advanced screening tests, which are further expected to boost the market growth.

The rising research studies by government and private organizations to develop technologically advanced screening tests are expected to expand the market growth. For instance, in May 2022, the Barcelona Supercomputing Center (BSC) coordinated QUSTom (Quantitative Ultrasound Stochastic Tomography), a new European project that aimed to launch a new medical imaging modality based on ultrasound and supercomputing, which will replace current techniques that use X-rays such as mammograms. This technology is found to be safer for patients as it does not use any type of radiation. It will also offer superior image quality and better monitoring of tumors, among other advantages. Such projects intend to revolutionize breast cancer detection using ultrasound imaging and thereby augment the market growth during the forecast period.

Additionally, in January 2021, Hologic Inc. launched 3D ultrasound imaging on the SuperSonic MACH 30 and 20 ultrasound systems in Europe. This innovation gives clinicians access to high-resolution B-mode and ShearWave PLUS elastography 3D volumes, providing additional insights and enhancing diagnostic certainty for breast cancer. The launches by market players are expected to augment the demand for imaging tests in the region during the forecast period.

Therefore, owing to the aforementioned factors, such as the high burden of breast cancer, rising clinical trial developments, and increasing product launches, the studied market is anticipated to witness growth over the analysis period. However, the high cost of breast cancer screening tests, side effects of radiation during screening tests, and errors in screening are likely to impede the market growth.

Europe Breast Cancer Screening Tests Market Trends

Mammograms Expected to Hold a Major Share in the Europe Breast Cancer Screening Test Market Over The Forecast Period

Mammograms are the most widely used tests to screen for breast cancer. Mammography is considered the gold standard technique used to screen breast cancer.

Governments and other healthcare organizations in the Europe region are taking initiatives to provide women, between the ages of 50 and 75, access to mammography screening, this is increasing the demand for mammography while laboratory and blood tests and other imaging tests are gaining popularity. For instance, as per the data from Eurostat published in October 2021, two-thirds (66%) of women aged between 50 and 69 years in the European Union reported that they had received a mammogram within the previous two years. Additionally, in September 2022, as a part of the European cancer screening scheme, the new EU approach is likely to support Member States ensuring that 90% of the EU population who qualify for breast cancer screenings are offered such screening by 2025. These initiatives to provide breast cancer screening is expected to propel the demand for mammograms in the region during the forecast period.

Furthermore, according to clinicaltrials.gov, a clinical trial was initiated in April 2021 to evaluate mammography screening with artificial intelligence (MASAI). The expected completion date of the trials is April 2025 and is sponsored by the regional council of Scania County in Sweden. The Cancer Registry of Norway also collaborated in the trial. The objective of this randomized controlled

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trial was to assess whether AI can improve the efficacy of mammography screening, compared with conventional mammography screening. The rising clinical trials of mammograms in the region are expected to create an opportunity for the market players for integrating advanced technologies such as AI in mammograms for more effective breast cancer screening.

Additionally, the launches by market players are also expected to accelerate the segment's growth. For instance, in November 2022, Hologic, Inc's 3Dimensions mammography system was awarded EUREF Type Test certification by the European Reference Organisation for Quality Assured Breast Screening and Diagnostic Services. It is one of the first digital breast tomosynthesis (DBT) systems to be certified, as well as one of only nine mammography systems in total. The launch of technologically advanced products is expected to boost the demand for mammograms and augment the segment's growth during the forecast period.

Therefore, owing to the above-mentioned factors such as rising government initiatives to boost breast screening, along with increasing clinical trials for the technological advancements in mammograms and launches is expected to witness significant growth in the segment during the forecast period.

Germany is Expected to Hold a Significant Share in the Europe Breast Cancer Screening Tests Market Over the Forecast Period

Germany is expected to hold a significant market share due to factors such as the high burden of breast cancer and rising awareness initiatives.

For instance, in February 2022, German startup Vara democratized access to breast cancer screening. The startup aims to provide every woman with lifesaving access to enhance breast cancer screening and recruited breast radiologists to fulfill the goal. Also, in October 2022, Berlin-based startup Vara raised USD 4.8 million (EUR 4.5 million) as it scaled its mission to make data-driven breast cancer screening accessible to everyone, everywhere.

Additionally, awareness campaigns in the country are expected to accelerate market growth during the forecast period. For instance, in October 2021, a breast cancer awareness campaign, 'Breast Cancer Affects Us All', was conducted by Wefra Life and the non-profit association Pink Ribbon Germany, to raise awareness about breast cancer, creating a sense of community around the issue, and promoting breast care, a free multilingual app that covers all relevant aspects of early breast cancer detection and prevention in the multimedia form in seven different languages. Such awareness initiatives are expected to increase the utility of breast cancer screening in the country thereby augmenting the market growth during the forecast period.

The rising launches by market players are projected to increase the market growth in the country. For instance, in April 2021, the Amulet Innovalitymammography system's new "Harmony" version was released by FUJIFILM Europe GmbH. The Amulet Innovalitymammography system from Fujifilm was available in the "Harmony" version, version AWS V9.3.

Therefore, owing to the factors such as the rising launches of screening tests by market players and increasing awareness initiatives in the country, the country is expected to witness growth during the forecast period.

Europe Breast Cancer Screening Tests Industry Overview

The Europe breast cancer screening test market is moderately competitive and consists of several major players. In terms of market share, a few of the major players currently dominate the market. With the increasing awareness among the population and rising advances in screening test, a few other smaller players are expected to enter the market and may come to hold a substantial share. Some of the major players in the market are Allengers, Myriad Genetics, Hologic Inc., and Siemens Healthineers, among others.

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Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Growing Incidence of Breast Cancer and Government Initiatives for Early Detection of Breast Cancer
 - 4.2.2 Increasing Clinical Trial Developments and Technological Advancements in Tests
- 4.3 Market Restraints
 - 4.3.1 High Cost of Breast Cancer Screening Tests
 - 4.3.2 Side Effects of Radiation during Screening Tests and Errors in Screening
- 4.4 Porter's Five Forces Analysis
 - 4.4.1 Threat of New Entrants
 - 4.4.2 Bargaining Power of Buyers/Consumers
 - 4.4.3 Bargaining Power of Suppliers
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)

- 5.1 By Test Type
 - 5.1.1 Genomic Tests
 - 5.1.2 Imaging Test
 - 5.1.2.1 Mammograms
 - 5.1.2.2 Ultrasound
 - 5.1.2.3 MRI
 - 5.1.2.4 Tomography
 - 5.1.2.5 Other Imaging Tests
- 5.2 Geography
 - 5.2.1 Germany
 - 5.2.2 France
 - 5.2.3 United Kingdom
 - 5.2.4 Italy
 - 5.2.5 Spain
 - 5.2.6 Rest of Europe

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles

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- 6.1.1 Allengers
- 6.1.2 Agendia Inc.
- 6.1.3 Myriad Genetics, Inc.
- 6.1.4 Koninklijke Philips N.V.
- 6.1.5 GE Healthcare
- 6.1.6 Fujifilm Holdings Corporation
- 6.1.7 NanoString Technologies, Inc.
- 6.1.8 Siemens Healthineers
- 6.1.9 Hologic Inc.
- 6.1.10 Quest Diagnostics Incorporated

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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