

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

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Report description:

The Europe Mammography Market size is estimated at USD 594.29 million in 2024, and is expected to reach USD 906.03 million by 2029, growing at a CAGR of 8.80% during the forecast period (2024-2029).

The COVID-19 outbreak hurt the mammography market because many hospitals and screening centers had to close because of a lockdown. For example, the NCBI research study that came out in June 2022 says that COVID-19 has made people less likely to go to breast cancer screenings, especially those who have gone before and those who are new. Also, a study published by the British Journal of Cancer in March 2021 says that the COVID-19 pandemic in Europe messed up a lot of breast cancer screening programs, which led to an increase of 2.0 breast cancer deaths per 100,000 people in 10 years. This has impacted the market's growth. However, with the ease of COVID-19 restrictions, decreasing cases of COVID-19, and the resumption of screening services, hospital and clinic visits for screening breast cancer have increased, owing to which the market has slowly started to gain traction and is expected to maintain the upward trend over the forecast period.

The main things driving market growth are the growing number of women with breast cancer, improvements in breast imaging technology, and efforts to raise awareness about breast cancer screening. Breast cancer is one of the most common types of cancer in Europe. Because of this, there is a growing need for proper treatment and screening to find breast cancer, so the market is likely to grow over the next few years. For example, a report from the Joint Research Commission of the European Commission that came out in July 2021 said that breast cancer would be the most common type of cancer in Europe in 2021. The same source also reported that more than 355,000 women in the European Union (EU-27) were diagnosed with breast cancer in 2021, which was about 13.3% of all cancer diagnoses. Over the next five years, the market is also expected to grow because more people are learning about breast cancer and getting checked on time. For instance, as per a news article published in October 2021, a breast cancer awareness campaign, 'Breast Cancer Affects Us All', was created by Wefra Life and the non-profit association Pink Ribbon.

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Germany to raise awareness about breast cancer, create a sense of community around the issue, and promote breast care through a free multilingual app that covers all relevant aspects of early breast cancer detection and prevention in multimedia form in seven different languages. Furthermore, in July 2021, Federacion Española de Cancer de Mama (FECMA) organized a campaign to raise awareness about the types of breast cancer and the needs of breast cancer patients and advocate for them. Thus, increasing cases of breast cancer and favorable initiatives are expected to propel market growth over the forecast period.

Several companies are also working to improve breast cancer screening programs in Germany and to increase their market share in the country by forming strategic alliances, such as partnerships and acquisitions. For example, in July 2021, GE Healthcare Germany donated a mobile mammography unit to help check for breast cancer in women. Within three months, the unit was made for private radiology practice after training the users and calibrating the mammography equipment. Also, a lot of big tech companies use AI (artificial intelligence) models that can automatically find breast cancer. For instance, in May 2021, Roche Italia and Fujifilm Italia collaborated with the Italian National Health Services to reprioritize breast health with the screening-routine campaign. This collaboration included the replacement of obsolete equipment with a focus on the ratio between analog and digital machines in each region of Italy. These programs and technological advancements associated with mammograms are expected to boost market growth over the forecast period.

But the market may not grow as fast as expected over the next few years if the costs are high and insurance companies don't pay for them or if radiation exposure causes bad side effects.

Europe Mammography Market Trends

Digital Systems Segment is Expected to Witness Considerable Growth Over the Forecast Period

Full-field digital mammography (FFDM), also known as digital mammography, is a mammography technique in which solid-state detectors that turn x-rays into electrical signals take the place of x-ray film. These detectors are similar to those found in digital cameras. Electrical signals are used to create images of the breast that can be seen on a computer screen or printed on a special film, similar to conventional mammograms. The digital mammography system segment is expected to witness significant growth over the forecast period owing to factors such as rising technological advancement and increasing incidences of breast cancer in Europe. In addition, with the advent of digital mammography, an increasing number of countries are experiencing shifts toward these newer systems, due to their superior depiction of low-contrast objects, wider dynamic range, and improved diagnostic quality of images, especially when examining dense breasts.

People with breast cancer are more likely to get infections, and a lot of groups have worked hard to stop these diseases. For example, in September 2020, the European Society for Medical Oncology (ESMO), the Spanish Society of Radiation Oncology (SEOR), and the Spanish Society of Medical Oncology (SEOM) published some recommendations on how to change treatment protocols to reduce risks for breast cancer patients. The updated recommendations include ways to do procedures that are more effective, which would help the therapies. Furthermore, the rising number of product launches in the region is also contributing to the growth of the segment. For instance, in April 2021, Fujifilm Europe GmbH launched the 'Harmony' version of its Amulet Innovation mammography system in Germany. AMULET Innovation is a Full Field of Digital Mammography (FFDM) equipped with Fujifilm's unique and innovative technologies that achieve optimum image quality at a very low patient dose. Therefore, owing to product launches and favorable initiatives, considerable segment growth is anticipated over the forecast period.

United Kingdom is Expected to Witness Significant Growth Over the Forecast Period

The increasing cases of breast cancer, favorable initiatives, and product launches are the major factors propelling the market growth in the United Kingdom. For instance, 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. In addition, the same source also

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reported that 46,000 people were diagnosed with breast cancer in England every year, followed by 4,700 in Scotland, 2,800 in Wales, and 1,500 in Northern Ireland. Thus, the high burden of breast cancer cases raises the need to early detect breast cancer which is expected to propel the market for mammography over the forecast period in the United Kingdom.

Furthermore, as per the report published by Breast Cancer UK in July 2022, there were around 56,000 new cases of breast cancer every year which is over 150 cases every day in the United Kingdom. The same source also reported that breast cancer is the most common cancer in the United Kingdom, representing 15.0% of all new cancer cases. Furthermore, breast cancer cases have increased by 24.0% over 23 years and increased by 5.0% over 10 years in the United Kingdom. Additionally, favorable initiatives by private and public organizations are also expected to propel market growth. For instance, the National Health Service (NHS) Breast Screening Program was successful in England in November 2020 in lowering the mortality rate from breast cancer. Furthermore, the Continuing Professional Development program for Radiography and Mammography was introduced by the firm Fujifilm in the United Kingdom in October 2020. The goal of Cancer Research UK's partnership with Avon Foundation for Women, which is a component of Avon's Breast Cancer Promise, is to provide crucial breast cancer information to 100.0 million women annually. Therefore, owing to favorable initiatives and increasing cases of breast cancer, considerable market growth is expected in the United Kingdom over the forecast period.

Europe Mammography Industry Overview

The mammography market is a consolidated one, owing to the presence of a few major players in the market. Moreover, many of the global players have their headquarters in European countries, which increases the accessibility of Mammography devices throughout Europe. The competitive landscape includes an analysis of a few international as well as local companies which hold market shares and are well known including Carestream Health Inc., Fujifilm Holdings Corporation, GE Healthcare, Hologic Inc., and Koninklijke Philips NV among others.

Additional Benefits:

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

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