

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

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Report description:

The India Mammography Market size is estimated at USD 67.35 million in 2024, and is expected to reach USD 111.10 million by 2029, growing at a CAGR of 10.53% during the forecast period (2024-2029).

During the COVID-19, considering the susceptibility of cancer patients to the COVID-19 infection, all the elective procedures and diagnosing treatments for breast cancers were postponed until further notice from the government. This directly impacted cancer care leading to late diagnosis and, in turn, delaying chemotherapy sessions resulting in disease progression. Patients with breast cancer had skipped more than two to three months of their treatment ultimately resulting in a disease prognosis. In addition, social factors have also contributed to decreasing the number of breast cancer screening procedures. For instance, lack of awareness regarding the availability of treatment during the pandemic, along with the misconceptions of considering COVID-19 more harmful than cancer has hampered the number of diagnostic procedures in India. Women in the initial stages with painless symptoms also delayed their screenings, waiting for the curbs and restrictions to normalize, before consulting a specialist or oncologist. The number of newly diagnosed cases continued to remain low post several months after the nationwide lockdown was lifted. For a country like India wherein the majority of the diagnosis of breast cancer yet happens in the later stages, the outbreak has further hindered the diagnosis process, thus, impacting the survival rates in women. Furthermore, according to a report 'Changing consumer preferences towards health care services: The impact of COVID-19', in 2020, it was found that 90% of respondents expressed fear of visiting hospitals during COVID times, while over 50% were concerned about health management post lockdown. More than 70% of respondents are preferring visiting hospitals that did not treat COVID-19 patients, while approximately 45% were willing to do so only if COVID-19 patients were treated in separate buildings. Hence, owing to the reduced number of people visiting hospitals during the pandemic, the market studied has witnessed a decline in India during the years 2020 and 2021.

The major factors contributing to the growth of the market are the rising incidence of breast cancer, and rising initiatives by various governments and NGOs to raise awareness about the early diagnosis of microcalcifications in breast tissue. In India, the incidence of breast cancer is increasing, particularly in urban areas among women aged 30 to 40, according to the Indian Council of Medical Research (ICMR) 2020 National Cancer Registry Programme Report. Lack of knowledge has caused delays in diagnosis, which has made it a key factor in mortality rates. The Indian healthcare system is experiencing immense progress due to the economic growth, and expansion of ambulatory clinics, public hospitals, and diagnostic centers throughout the country. The penetration rate of diagnostic imaging is increasing with the expansion of these healthcare centers. In urban centers, several Tier-I hospitals are moving from analog mammography techniques to digital tomosynthesis or 3-D mammography to decrease the number of false positives associated with the analog version. In India, high unmet needs, increasing incomes, rising funding from various public and private organizations, and collaboration between different government organizations are expected to drive the overall growth of the market, during the forecast period.

India Mammography Market Trends

Specialty Clinics are Expected to Witness Steady Growth

The factors responsible for the growth in this segment include the rise in the prevalence of breast cancer cases and the greater use of mammography devices in diagnosing cancer cases. Many strategic initiatives are also being undertaken that can boost the market growth, along with awareness programs conducted by these clinics.

According to the estimates of the International Agency for Research on Cancer 2020, the estimated five-year prevalence rate of breast cancer cases in India was 459,271. Thus, the huge prevalence of breast cancer cases in India is expected to boost the demand for seeking mammography scans that are available in clinics too. This is expected to boost the market growth during the forecast period. Additionally, new breast clinics are being launched in India. For instance, in February 2021, at the Sir HN Foundation Hospital and Research Center, a one-stop breast clinic, was launched that can scan women for potential breast cancer diagnoses. This may boost the demand for mammography devices from such facilities in the long run.

In November 2020, the Aster RV Breast Clinic was launched in India that utilizes advanced diagnostic tests to accurately diagnose and treat all breast-related issues with advanced 2D combined with 3D mammograms, breast ultrasounds, biopsy, and breast MRI. This is likely to boost market growth.

India Mammography Industry Overview

The India 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

Table of Contents:

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

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2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 Growing Burden of Breast Cancer

4.2.2 Technological Advancements in the Field of Breast Imaging

4.3 Market Restraints

4.3.1 Risk of Adverse Effects from Radiation Exposure

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 Product Type

5.1.1 Digital Systems

5.1.2 Analog Systems

5.1.3 Breast Tomosynthesis

5.1.4 Other Product Types

5.2 By End User

5.2.1 Hospitals

5.2.2 Specialty Clinics

5.2.3 Diagnostic Centers

6 COMPETITIVE LANDSCAPE

6.1 Company Profiles

6.1.1 Canon Medical Systems Corporation

6.1.2 Fujifilm Holdings Corporation

6.1.3 GE Healthcare

6.1.4 Koninklijke Philips NV

6.1.5 Siemens Healthineers

6.1.6 Carestream Health Inc.

6.1.7 Allengers Medical Systems Ltd

6.1.8 Hologic Inc.

6.1.9 Narang Medical Ltd

6.1.10 Planmed Oy

6.1.11 Trivitron Healthcare

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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