

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

Market Report | 2024-02-17 | 84 pages | Mordor Intelligence

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Report description:

The Mexico Mammography Market size is estimated at USD 38.75 million in 2024, and is expected to reach USD 54.72 million by 2029, growing at a CAGR of 7.15% during the forecast period (2024-2029).

As a result of the COVID-19 pandemic, numerous surgeries and treatments were halted, raising concerns regarding the length of the delay before the diseases pose a risk to the patient's health. Likewise, the impact of the pandemic on the Mexican mammography market was fairly adverse on account of the postponement or cancellation of elective procedures. To curb the spread of the virus, the Mexican government undertook several reforms by limiting the use of healthcare facilities for patients other than those suffering from COVID-19. As breast cancer screening was listed as an elective procedure, numerous appointments were rescheduled or canceled in March 2020, depending on the situation in particular areas of the country. As a result, the number of mammography procedures declined on account of movement restrictions and social distancing norms. As per the data published by the World Health Organization in March 2022, COVID-19 resulted in delayed screening of breast cancer across Mexico which has led to complications among the women having breast cancer. Hence, it is observed that the market studied was significantly hampered during the COVID pandemic.

The major factors affecting the growth of the market are the rising incidence of breast cancer, huge R&D in breast cancer therapies, and advances in breast imaging modalities. Over the past few years, the market for mammography devices has been expanding in Mexico due to the growth of its per capita income, increase in healthcare investment, and the availability of domestic and foreign companies selling their products. Additionally, factors such as the growing prevalence of breast cancer, technological advancements in the field of breast imaging, and the investment from various organizations in breast cancer screening campaigns affect the market's growth. Additionally, according to the World Health Organization, the number of mammographs done per 10,000 breast cancer patients was 64.4 in 2020. Although this number is slightly low, since Mexico is an

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upper-middle-income country, it is relatively high compared to developing countries. Additionally, the Globocan 2020 report stated that as of 2020, Mexico saw 29,929 cases of breast cancer, and breast cancer was ranked number one by both incidence and mortality. This is expected to boost the demand for mammography devices. Thus, the availability of advanced mammography services and high disease incidence are expected to boost market growth during the forecast period.

Mexico 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 three-dimensional images of the breast.

In December 2020, Martha T. Manda-Mapalo, published the article 'Breast Cancer Screening Among Medically Underserved Women: Potential for Lower Recall Rates with Digital Breast Tomosynthesis,' comparing recall rates, cancer detection rates, positive predictive values of full-field digital mammography (FFDM) plus Digital breast tomosynthesis and FFDM in screening mammograms at the University of New Mexico. The study concluded that a 30% relative risk reduction in RRs was observed with FFDM+DBT. The same study stated that qualitative interviews suggested that women are aware of and receptive to DBT, with adequate educational support.

Lourdes Noemi Santos Aragon of Radiology, ABC Medical Center IAP, Mexico, published the article 'Effectiveness of Tomosynthesis Versus Digital Mammography in the Diagnosis of Suspicious Lesions for Breast Cancer in an Asymptomatic Population' in 2021, stating even in asymptomatic patients, 20 breast cancers were detected, with a sensitivity of 54% and a specificity of 88%, exceeding the specificity of diagnostic mammography. The study concluded that tomosynthesis increases sensitivity and specificity over diagnostic mammography.

The growing research and funding in the country regarding advanced digital breast tomosynthesis are expected to boost segment growth, and the growing medical tourism will demand advanced diagnosing methods, resulting in the growth of the segment in the country.

Mexico Mammography Industry Overview

The Mexican 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 Analogic Corporation, 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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