

Middle East & Africa Mammography - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Middle East & Africa Mammography Market size is estimated at USD 87.54 million in 2024, and is expected to reach USD 127.08 million by 2029, growing at a CAGR of 7.74% during the forecast period (2024-2029).

Due to the COVID-19 pandemic, the number of visits to hospitals and diagnostic centers for breast cancer care decreased during the early pandemic in the Middle East and African countries, leading to a reduction in the demand for mammography procedures. For instance, according to an article published by the International Surgery Journal in April 2022, a study was conducted in Saudi Arabia which showed that the COVID-19 pandemic led to a more stressful situation among physicians, which has affected the management of breast cancer patients. Thus, owing to the COVID-19 pandemic, the mammography market was significantly impacted during the initial pandemic phase. However, as the pandemic has currently subsided, breast cancer care in the Middle East and African countries has gone back to normal, so the studied market is expected to have stable growth during the forecast period of the study.

The major factors responsible for the growth of the mammography market include the growing prevalence of breast cancer, technological advancements in the field of breast imaging, and investment from various organizations in breast cancer screening campaigns.

The rising prevalence of breast cancer is the major reason that is driving the adoption of mammography procedures in the region. For instance, according to the data published by the South African Government in October 2022, the incidence of breast cancer among South African women is said to be increasing, and it is one of the most common cancers among women in South Africa. It is one of the most prevalent cancers amongst white and Asian women in South Africa and the second most common cancer among black and colored women. The article also stated that the early detection of the condition could lead to effective treatment

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and a positive prognosis, and it is estimated that about 90% of patients survive many years after diagnosis when breast cancer is detected at the early stages. Regular self-breast examinations and regular mammography tests are key factors in early detection. Thus, the rising prevalence of breast cancer and the importance of mammography for the treatment of breast cancer is expected to boost the market growth.

Furthermore, according to an article published by BMC Cancer in February 2022, it has been observed that breast cancer survival rates are increasing in most developed countries due to early detection and more effective treatment, but the scenario is completely opposite in Sub-Saharan Africa (SSA) countries. It is mainly due to the advanced stage presentation of breast cancer, with approximately 80% of patients presenting with locally advanced and metastatic disease at diagnosis. It was also stated efforts had been made by various organizations to reduce the burden of disease in these countries, which is focused on improving survival by increasing the rates of early detection of breast cancer. Thus, the high burden of breast cancer in these countries and the need for mammography procedures are expected to boost the market growth.

Moreover, the increasing investments by various organizations in breast cancer awareness campaigns are also expected to boost market growth. For instance, in October 2022, the Ministry of Health and Prevention (MoHAP) launched a national breast cancer awareness campaign in UAE to highlight the importance of early detection of breast cancer and prevention methods.

Thus, the above-mentioned factors, such as the rising prevalence of breast cancer and the increasing efforts for breast cancer screening, are expected to boost market growth. However, the risk of adverse effects from radiation exposure coupled with the reduction in reimbursement is expected to impede the market growth.

Middle East Mammography Market Trends

Digital Mammography Segment is Expected to Hold a Significant Market Share Over the Forecast Period

Digital mammography is a specialized and advanced form of mammography that uses digital receptors and computers instead of X-ray films to examine breast tissue for tumor presence. So far, conventional screen-film mammography (SFM) with high spatial resolution has been the preferred choice for screening programs in most countries. Digital mammography systems have a superior depiction of low-contrast objects, wider dynamic range, and improved diagnostic quality of images, especially when examining denser breasts. They also come with the added advantage of soft-copy image displays and soft-copy reading, which can be easily transferred. Thus, the rising advantages of digital mammography and the rising prevalence of breast cancer, coupled with the rising geriatric population, are expected to drive segment growth.

The rising prevalence of breast cancer, coupled with the rising geriatric population, is the major factor that is driving the adoption of digital mammography systems in the region. For instance, according to an article published by PubMed Central in March 2022, breast cancer is the most prevalent cancer among females in the Middle East, and in Qatar, breast cancer is one of the most diagnosed cancers among women. The article also stated that early detection of breast cancer is associated with decreased age-adjusted mortality rates of the disease. Thus, the rising prevalence of breast cancer and the importance of early detection of the disease are expected to boost the adoption of digital mammography systems. Moreover, as old age is often associated with breast cancer, the rising geriatric population is a key factor for segment growth.

Moreover, the rising developments by key market players and organizations in the region are also expected to boost market growth. For instance, in June 2021, Kheiron Medical Technologies distributed its Mia, or 'mammography intelligent assessment,' in the GCC region via a new partnership with Atlas Medical. It is an artificially intelligent solution for breast cancer screening. Furthermore, in January 2021, Prognica Labs, a UAE-based company, used artificial intelligence to detect masses in mammography screenings in the country. Hence, such developments will increase the adoption of digital mammography in the region.

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Thus, the above-mentioned factors such as the increasing advantages of digital mammography and the rising prevalence of breast cancer, and the rising geriatric population are expected to boost the segment growth.

GCC is Expected to Hold a Significant Market Share Over the Forecast Period

The GCC region comprises Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates. The major factors driving the growth of the market in GCC are the increasing prevalence of breast cancer, the increasing launch of technologically advanced products, the rising geriatric population, and the growing radiological procedures in the country.

For instance, according to an article published by MDPI in November 2022, it is expected that Saudi Arabia will continue to show an increase in breast cancer incidence, and long-term preventive measures and more effective screening strategies such as mammography are required to alleviate the burden of the disease. Thus, the high incidence of breast cancer in the country is expected to boost the usage of mammography procedures during the forecast period of the study.

Moreover, according to an article published by JCO Global Oncology in January 2023, breast cancer is said to be one of the most common cancers in the United Arab Emirates (UAE), and women generally had positive attitudes toward breast cancer screening in UAE, but they wanted more breast cancer awareness campaigns year-round and better access to screening.

Furthermore, the rising developments in the region by various organizations are also expected to boost the market growth in GCC. For instance, in October 2021, Abu Dhabi Health Services Company (SEHA) officially launched a new mobile mammography clinic in UAE as part of its Ambulatory Healthcare Services (AHS) partnership with EIN Healthcare and Siemens Healthineers.

Thus, the above-mentioned factors, such as the increasing prevalence of breast cancer, the increasing launch of technologically advanced products, the rising geriatric population, and the growing radiological procedures in the country, are expected to boost market growth.

Middle East Mammography Industry Overview

The Middle East & Africa mammography market is consolidated, 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, Hologic Inc., Koninklijke Philips NV, and Siemens Healthineers, among others.

Additional Benefits:

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

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