

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

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Report description:

The South Africa Mammography Market size is estimated at USD 24.02 million in 2024, and is expected to reach USD 34.18 million by 2029, growing at a CAGR of 7.31% during the forecast period (2024-2029).

The outbreak had a huge economic impact on South Africa. Due to cost-cutting measures in both internal and overseas activity, its Gross domestic product (GDP) dropped by 7% in 2020. This contraction is expected to have a significant influence on the country's healthcare business. Furthermore, in March 2021, Doctor Pieter Henning, who is a diagnostic radiologist at keystone radiology supported the statement saying that the pandemic had a deleterious impact on Breast Cancer Care in South Africa as it largely prevented women from coming forward to perform mammograms. He further stated that the average statistics witnessed a decline of 5% in mammograms that were performed, compared to the last year.

The disruption caused due to the pandemic resulted in fewer women commencing their breast diagnosis. As per the news article published in October 2020, the Breast Imaging Society of South Africa (BISSA) reported more than a quarter of new cancer cases in women within the country. Lesser breast screenings resulted in 8% more cancer deaths in 2020. Additionally, Noluthando Nematswerani, head of Discovery Health's Centre for Clinical Excellence detailed that the medical aid scheme in South Africa observed a 17% decline in mammograms per 1000 patient visits in 2020, compared to the historic years.

On account of the increasing occurrences of breast cancer among the South African population, the need for diagnostic tests is anticipated to grow over the coming years. As mammography provides greater accuracy in detecting breast cancer, the growth of the mammography market within the country is projected to increase over the analysis period. Likewise, as per the Cancer Association of South Africa (CANSA) report published in May 2021, a mammogram must be done every year for all women from age 40 for non-symptomatic breast screening. Also, women aged 55 years and older should have a mammogram every two years

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or have the choice to continue with an annual mammogram. Such practices are expected to boost the demand for mammograms in the near future.

South Africa Mammography Market Trends

Digital Systems are Expected to Hold Significant Share in Product Type Segment

In digital mammography, the X-ray film is replaced by solid-state detectors that convert X-rays into electrical signals, and these electrical signals are used to produce images of breasts. Digital mammogram images are stored on a computer and can be easily shared electronically, allowing multiple providers to share necessary data to improve care.

Digital mammography uses less radiation. Digital mammograms also have better picture clarity and the ability to alter the photos afterward. This can make detecting abnormal changes much more accurate, due to the details provided. Gianluca Gatta, in the article, 'Second-Generation 3D Automated Breast Ultrasonography (Prone ABUS) for Dense Breast Cancer Screening Integrated to Mammography: Effectiveness, Performance, and Detection Rates', published in 2021, stated that integrating full-field digital mammography (FFDM) with 3D-prone automated breast ultrasound in women with high breast density increases and improves breast cancer detection rates in a significant manner, including small and invasive cancers, and it has a tolerable impact on recall rate.

In addition, the market in South Africa is likely to witness satisfactory growth owing to technological advancement. For instance, the South African company CapeRay is offering a product called the Aceso system, integrating two modalities, i.e., full-field digital mammography and automated breast ultrasound into a single device that enables simultaneous acquisition of both sets of images.

The existing high prevalence of breast cancer among women in this region and the growing advancements and awareness about efficient mammographs will be a major driver for the growth of the segment.

South Africa Mammography Industry Overview

The South Africa 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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