

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

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Report description:

The Spain Mammography Market size is estimated at USD 62.40 million in 2024, and is expected to reach USD 92.18 million by 2029, growing at a CAGR of 8.12% during the forecast period (2024-2029).

Key Highlights

- COVID-19 had an adverse effect on market growth during the initial phase of the pandemic. According to the study published in eLife in June 2022, there has been a huge reduction in breast cancer screening during the pandemic, especially in previous participants and newcomers. Furthermore, according to the study published in Cancer Journal in June 2021, breast cancer patients were the highest number of patients lost from diagnosis during the pandemic. Therefore, the impact of COVID-19 on breast screening attendance has led to a decline in the market growth initially. However, the market has attained its pace post-pandemic and is anticipated to grow significantly over the forecast period.
- The factors driving the market growth include the growing burden of breast cancer, technological advancements in the field of breast imaging, and investment from various organizations in breast cancer screening campaigns, among others.
- According to the Spanish Network of Cancer Registries in November 2022, the incidence of breast cancer in women in Spain was found to be 34,750 in 2022, with an increase of 0.9% each year. Therefore, the rising incidence of breast cancer in Spain is anticipated to increase the demand for breast cancer diagnosis, driving market growth. Furthermore, the rising benefits of early detection of breast cancer in women with risk-based cancer screening are anticipated to propel the market growth. For instance, according to the study published in PLOS ONE in February 2022, the increasing benefits of risk-based breast cancer screening have led to increased adoption of mammography.
- Therefore, the rising incidence and increasing benefits of early detection of breast cancers are anticipated to drive market growth. However, the risk of adverse effects from radiation exposure and lack of proper reimbursement for breast cancer diagnosis are expected to hinder the market growth.

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Spain Mammography Market Trends

Diagnostic Centers Segment is Expected to Hold a Significant Market Share Over the Forecast Period

- The factors contributing to the segment growth include increasing awareness about breast cancer screening in Spain, the rising prevalence of breast cancer, strategic initiatives undertaken by the major players, and the presence of better healthcare infrastructure.
- According to the Observatory of the Spanish Association Against Cancer (AECC) in 2023, the number of clinically diagnosed breast cancer cases in 2022 was 34,722 compared to 34,353 in 2021. The rising prevalence of breast cancer cases in Spain is anticipated to increase demand for breast cancer screening in diagnostic centers, thereby anticipated to promote segment growth.
- A lot of new investments are also being made by the players operating in the market. For instance, Inbiomotion received an oversubscribed funding round from Alta Life Sciences to launch its breast cancer detection device. The company is working on a test to predict bisphosphonate response in adjuvant breast cancer situations and prevent metastases. Since these tests can also be performed in diagnostic facilities, such improvements could expand the market.
- Since there have been several awareness initiatives in Spain in recent years, more patients are likely to be interested in getting mammograms at diagnostic facilities. Furthermore, the rising partnerships among the diagnostic centers in Spain and key market players are expected to drive the segment growth due to increased adoption of these services from diagnostic centers to benefit from technological advancements. For instance, In May 2021, the Imagine Diagnostic Center in Barcelona, Spain, and Fujifilm Europe GmbH deployed the first contrast mammography machine in the private sector. Therefore, the partnership between the diagnostic center and the key market player is anticipated to contribute to the segment growth. The above developments are further expected to improve the market growth in this segment.

Digital Systems is Expected to Hold a Significant Share in the Market Studied

- Full-field digital mammography (FFDM), commonly known as digital mammography, is a kind of mammography in which solid-state detectors that turn X-rays into electrical signals take the place of the traditional X-ray film. Like traditional mammograms, the electrical impulses are utilized to create pictures of the breast that may be seen on a computer screen or printed on specialized film.
- The rising initiatives from the key market players and approvals from the European Union (EU) on digital mammography are expected to boost segment growth further. For instance, in January 2023, the EU approved Bayer's iodine-based contrast agent UltravistTM-300, -370 for contrast-enhanced mammography (CEM). Digital mammography and the injection of a contrast agent, such as Ultravist, are combined in the developing modality known as CEM to enhance breast cancer diagnosis and direct treatment choices. Such approvals in digital systems are expected to drive segment growth over the forecast period.
- Furthermore, technological advancements such as Artificial Intelligence (AI) in mammography are expected to bolster the market growth over the forecast period. For instance, according to the news published in Spain in July 2021, the use of artificial intelligence (AI) in breast cancer screening might save radiologists' workload by up to 70% by helping in the transition from digital mammography to digital breast tomosynthesis. Such advancements lead to increased adoption of digital mammography, besides the implementation of AI, driving the segment growth.
- Therefore, factors such as rising technological advancements, rising initiatives from the key market players, and rising approvals from the European Commission are all expected to drive the segment growth.

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Spain Mammography Industry Overview

The Spain mammography market is moderately competitive and consists of several major players. The factors owing to the competition include the rising initiatives such as partnerships and product launches, among others by the key market players. Some of the companies that are currently operating in the market include GE Healthcare, Fujifilm Holdings Corporation, Siemens Healthineers AG, Carestream Health 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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