Middle East & Africa Mammography - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-08-01 | 80 pages | Mordor Intelligence

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Report description:

Middle East & Africa Mammography Market Analysis

The Middle East and Africa mammography market size stood at USD 94.32 million in 2025 and is projected to advance at a 7.74% CAGR, lifting total value to USD 136.92 million by 2030. Accelerated government spending on preventive oncology, a rapid conversion from analog to digital imaging, and the region's growing burden of breast cancer collectively underpin this growth. Digital systems already dominate new installations, yet breast tomosynthesis 3-D units are diffusing quickly as providers seek higher cancer-detection sensitivity for dense-breast populations. Hospital networks remain the principal buyers, but specialized diagnostic centers are expanding fastest as policymakers encourage decentralized screening access. Competitive positioning hinges on AI-enabled workflows and vendor-financed leasing that lower upfront capital constraints.

Middle East & Africa Mammography Market Trends and Insights

Rising Breast-Cancer Incidence Among Middle-Eastern Women

Age-standardized breast-cancer incidence in the MENA bloc climbed 90.9% between 1990 and 2019, reaching 37.5 per 100,000 women, and the disease presents roughly a decade earlier than in Western settings. Diabetes prevalence, urban lifestyle shifts, and later child-bearing amplify risk, forcing authorities to widen screening beyond the traditional 50-69-year bracket. GCC registries show Qatar nationals and expatriates exhibiting higher incidence than Saudi nationals, illustrating how rapid socioeconomic transitions intersect with disease epidemiology. The escalating burden compels ministries to secure additional mammography capacity, catalyzing steady procurement pipelines across both hospital and ambulatory settings.

Rapid Shift From Analog to 3-D Tomosynthesis Systems

Digital breast tomosynthesis (DBT) improves invasive-cancer detection by 20-65% compared with 2-D film while reducing recall rates during multi-year screening cycles. These clinical benefits resonate in dense-breast populations common to Middle-Eastern women, accelerating capital budgets for 3-D upgrades. Vendors now embed AI triage tools; GE HealthCare's Pristina Via integrates concurrent reading algorithms that flag suspicious lesions within existing PACS workflows . Facilities marketing DBT as standard of care report higher patient retention, signaling that image-quality differentials increasingly outweigh price gaps against legacy 2-D units.

High Acquisition & Maintenance Cost of DBT Units

DBT hardware prices exceed USD 300,000, straining budgets of district hospitals that also face currency volatility and import duties. Vendor-financed leases ease barriers but bundle annual service contracts that elevate lifecycle outlays. Limited in-country engineering expertise prolongs downtime, prompting some operators to retain analog back-ups for redundancy, a practice that slows full digital conversion.

Other drivers and restraints analyzed in the detailed report include:

Government & NGO-Funded Screening Campaigns / GCC-Wide AI Teleradiology Reimbursement Pilots / Shortage of Female Mammography Technologists /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Digital systems secured 57.14% of the Middle East and Africa mammography market share in 2024, underscoring how connectivity, dose efficiency, and PACS integration have eclipsed analog alternatives. The segment benefits from multiyear replacement mandates that align with quality-assurance protocols, anchoring a stable installed-base upgrade cycle. Simultaneously, breast tomosynthesis 3-D units are registering an 8.15% CAGR as clinicians prioritize volumetric imaging to detect small invasive lesions obscured in dense tissue. Hospitals leveraging DBT showcase lowered recall rates during community screening, thereby reducing unplanned diagnostic costs that were common with 2-D workflows.

The technological shift also catalyzes AI adjunct deployment, allowing facilities to triage cases and streamline radiologist workload. Fujifilm's Amulet Sophinity, unveiled at Arab Health 2025, integrates dual-energy CESM and automated positioning software to shrink scan time and improve patient comfort. Over the forecast, the Middle East and Africa mammography market size for 3-D systems is expected to add USD 19.1 million, reflecting hospital and diagnostic-center race to match emerging reimbursement for advanced screening packages. Analog systems continue their down-cycle, though selected rural programs retain film units where power stability is uncertain and images are courier-read in regional hubs.

The Middle East and Africa Mammography Market Report is Segmented by Product Type (Digital Systems, Analog Systems, Breast Tomosynthesis 3-D, Other Product Types), End User (Hospitals, Specialty Clinics, Diagnostic Centers), and Geography (Gulf Cooperation Council, South Africa, Rest of Middle-East & Africa). The Market Forecasts are Provided in Terms of Value (USD Million).

List of Companies Covered in this Report:

Hologic / Siemens Healthineers / GE Healthcare / Fujifilm Holdings Corp. / Canon / Koninklijke Philips / Agfa-Gevaert / Metaltronica / Konica Minolta / Planmed / iCAD Inc. / RadNet Inc. / Allengers Medical Systems / Mindray Bio-Medical Electronics / Trivitron Healthcare / Carestream Health / Shimadzu / Dilon Technologies / Esaote / United Imaging Healthcare /

Additional Benefits:

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

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