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# Canada Mammography - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 89 pages | Mordor Intelligence

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**Report description:**

Canada Mammography Market Analysis

Canada mammography market size in 2026 is estimated at USD 122.02 million, growing from 2025 value of USD 113.03 million with 2031 projections showing USD 179.08 million, growing at 7.96% CAGR over 2026-2031. Rising digitization across provincial screening networks, generous federal incentives for digital breast tomosynthesis (DBT), and Health Canada's streamlined Class III device approvals combine to pull forward demand for next-generation platforms. Provincial administrators are replacing legacy analog fleets to ease a 18.1% nationwide vacancy rate among medical radiation technologists, and are leaning on AI tools that cut technical repeats and bolster throughput. Competitive intensity is rising as Asian manufacturers push lower-priced systems while incumbent global vendors respond by embedding artificial intelligence, workflow software, and service bundles to defend share. Consolidation momentum is illustrated by RadNet's USD 103 million purchase of iCAD, underscoring the strategic premium attached to AI integration. Budget headwinds under the Canada Health Act slow upgrades in some provinces, yet mobile mammography rollouts for rural and Indigenous communities, plus DBT reimbursement uplifts, are expected to keep the Canada mammography systems market growing solidly through 2030.

Canada Mammography Market Trends and Insights

Federal Transition-To-DBT Reimbursement Incentives

Targeted billing codes such as British Columbia's 83046 and 83047 provide higher fees for DBT exams, tipping total cost-of-ownership in favor of 3-D platforms . Evidence showing 27% higher cancer detection and 15-20% lower recall rates further persuades payers that DBT adds value. Ontario has matched the uplift with new surgical fee codes, creating coordinated economic signals that shorten replacement cycles. Negotiations over federal health transfers increasingly fold DBT benchmarks into funding formulas, prompting lagging provinces to follow early adopters. Collectively, these moves speed the conversion from two-dimensional to tomosynthesis across the Canada mammography market.

Rising Province-Level Density-Notification Laws

Mandates requiring facilities to inform women of breast density now cover most provinces, influencing protocol upgrades. Dense tissue masks lesions on conventional 2-D studies and affects up to half the screening population, steering clinicians toward modalities that penetrate obscured tissue such as DBT, automated breast ultrasound, or contrast-enhanced mammography. Notification letters increase patient awareness and spur demand for advanced imaging packages, while potential liability risk pushes providers to adopt comprehensive offerings. Market fragmentation linked to different provincial timelines benefits vendors with broad product suites capable of meeting heterogeneous requirements.

Imaging-Staff Shortage Limits System Utilization

Vacancies force some facilities to idle suites despite equipment upgrades. Waterloo Region, for example, cut mammography hours even as Ontario's self-referral policy could add 130,000 annual screenings. Recruitment incentives and flex scheduling raise operating costs, dampening the immediate benefit of new hardware rollouts within the Canada mammography market.

Other drivers and restraints analyzed in the detailed report include:

AI-Assisted Workflow Cuts Recall Rates & Cost Per ExamMobile Mammography Expansion in Rural CanadaBudget Caps Under Canada Health Act Slow Cap-Ex Cycles

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

Segment Analysis

Digital full-field mammography platforms accounted for a commanding 61.88% Canada mammography systems market share in 2025. The Canada mammography systems market size for breast tomosynthesis is poised to rise at an 8.7% CAGR through 2031 as clinical data underscores superior detection rates and reduced callbacks. Hospitals and imaging centers view 3-D capability as essential for quality metrics and patient retention. Health Canada's nod to tomo-only screening removes the need for paired 2-D exposure, cutting radiation and read times. Vendors are layering AI decision-support and cloud connectivity to future-proof fleets, while analog units face accelerated obsolescence due to zero AI compatibility.

Regulatory acceptance plus reimbursement premiums cement tomosynthesis as the de-facto upgrade path. Early adopters report higher patient satisfaction scores and better radiologist workflow, shortening payback periods and justifying capital outlays even under tight budgets. Emerging technologies such as contrast-enhanced mammography and automated breast ultrasound sit in the "Others" bucket and attract niche demand for dense-breast protocols, yet their share remains modest. Continued modality diversification positions suppliers with end-to-end breast-health portfolios for outsized wins in the Canada mammography market.

The Canada Mammography Market Report is Segmented by Product Type (Digital Systems (FFDM), Analog Systems, Breast Tomosynthesis (3-D), Others), End User (Hospitals, Diagnostic Imaging Centres, Others), and Geography (Canada). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Hologic GE Healthcare Siemens Healthineers Fujifilm Holdings Corp. Canon Carestream Health Konica Minolta Planmed iCAD Inc. RadNet Inc. Analogic Corp. Sectra ScreenPoint Medical Delphinus Medical Tech. Candelis Inc. Agfa-Gevaert KUBTEC Medical Imaging Metaltronica IMS Giotto Aidoc Medical

Additional Benefits:

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

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