# U.S. Breast Imaging Devices Market to See Steady Growth Through 2017

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The U.S. breast imaging devices market decreased from 2007 to 2009 due to the effects of the Deficit Reduction Act (DRA), which changed reimbursement policies for imaging procedures, as well as the global economic recession. However, the market is expected to recover and continue growing at a compound annual growth rate of 10%, reaching over $1 billion by 2017. Recovery will be driven by the rapid growth and greater acceptance of the breast-specific gamma imaging and the positron emission mammography segments. A strong trend towards faster and higher quality imaging has resulted in an almost entire replacement of analog mammography by more advanced systems. In 2010, Hologic, GE Healthcare and Fujifilm were the leading competitors in the U.S. breast imaging market.

## Breast-Specific Gamma Imaging to Become Accepted Substitute for MRIs

Breast-specific gamma imaging (BSGI) is the fastest growing segment of the breast imaging market, as a supplement to mammography and ultrasounds. BSGI has a high level of sensitivity similar to that of magnetic resonance imaging (MRI), but costs less and provides more comfort for patients. BSGI is suitable for imaging women with breast implants, dense breasts, those at high risk and can also help evaluate suspicious areas identified on a mammogram. The U.S. market for BSGI is expected to continue growing at double-digit rates through 2017 and was one of the few markets that did not experience a decline during the global economic recession.

Adoption of BSGI will increase as the technology becomes an accepted substitute for MRIs. Growth of this procedure will be swift due to how few devices were in use in 2010, and as the installed base increases, there will be enough systems in use to perform a large numbers of scans. In addition, a new competitor, Gamma Medica Inc., entered the BSGI market in 2010. The company's LumaGEM™ MBI System was priced much higher than previous systems, causing nearly a 30% increase in the average selling price (ASP). Despite this rapid growth, the ASP for BSGI is expected to slightly decline through 2017 as the price of the LumaGEM™ MBI System decreases to compete with the less expensive Dilon 6800® Gamma Camera from Dilon Technologies.

## Positron Emission Mammography (PEM) Market Expects Double-Digit Growth

Positron emission mammography (PEM) is a new, specialized imaging modality used to detect breast cancer. In 2010, the market for PEM systems increased by more than 40%. PEM systems were also one of the few markets unaffected by the global economic recession of 2008 and 2009 and are expected to continue growing at double-digit rates through 2017. PEM systems offer similar scan times and selectivity to MRIs but at higher specificity. This technology is also a new alternative for patients who cannot receive MRIs due to metal devices, such as pacemakers, or claustrophobia concerns. PEM systems were first sold in 2007 and as competition increases, the systems are expected to see a continued decline in ASP through 2017.

The PEM segment will continue to experience rapid growth as PEM systems experience greater acceptance from medical professionals. An aging population will also drive the market. Most national mammography screening programs in the U.S. target women aged 50 to 70, with the highest incidence of breast cancer being found in 65-year-old women. The demographic of women aged 50 to 70 is expected to grow considerably faster than the total population, thus increasing the number of mammography procedures required over the forecast period. In addition, PEM technology has created a new market for patients who could not previously receive a breast MRI.

## U.S. Analog Mammography Market Expects Steep Decline Through 2017

In 2010, the market for analog mammography devices fell significantly, with a continued decline expected through 2017. Analog mammography is an older technology that will soon be fully replaced by digital mammography systems. The low number of analog mammography units that will continue to be sold will be purchased by clinics with low budgets for equipment or those that can handle the reduced efficiency of an analog system due to a minimum number of scans produced. While it may be expected, it is unlikely that the technology replacing analog devices will experience double-digit growth.. Both computed and digital radiography are able to take less time for scans and make it simpler for image storage. This allows physicians and imaging centers to require fewer systems to perform the same number of scans. The lowered demand for analog mammography devices will also impact the ASP, which is expected to decrease through 2017. The decreasing ASP is due to price reductions from manufacturers who wish to remain competitive with digital systems.

## Hologic, GE Healthcare and Fujifilm Lead U.S. Breast Imaging Market

Hologic was the leading competitor in the U.S. market for breast imaging in 2010. The company's competitive lead can be attributed to a strong presence in both the digital radiography and analog markets. Hologic's M-IV™ and Selenia™ mammography systems, as well as their NovaSure™ ablation devices, are highly regarded within the industry and have been very successful in terms of sales. In 2010, the Selenia™ DR system was limited to taking two-dimensional images; however the device can be configured for three-dimensional images if approved by the Food and Drug Administration (FDA).

Another major competitor in the U.S. breast imaging was GE Healthcare who competed in the digital radiography market with Hologic and also produced breast MRI coils. GE Healthcare has been producing mammography systems for over 50 years and is focused on developing accurate, efficient and patient-friendly breast imaging products. Fujifilm also competes in this market and is the only manufacturer to produce CR mammography systems.

## Additional Information is Available

The information contained in this article is taken from a global series of detailed and comprehensive reports published by iData Research (www.idataresearch.net). U.S. Market for Women's Health Devices 2011, European Markets for Women's Health Devices 2011 and Asia Pacific Markets for Women's Health 2011 are available for purchase. For more information and a free synopsis of the above reports, please contact iData Research at: **womenshealth@idataresearch.net**

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