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## Innovative Breast Imaging Systems



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The European market is evolving for innovative, multi-modality imaging systems which can accurately and efficiently detect breast cancer. With the expansion of the cohort of women 40 years of age and older, the typical population targeted by national screening programs, rates will continue to rise both for screening and diagnosis. As such, the need for new diagnostic equipment for procedures such as biopsy is expected to increase.

### Billion-Dollar Market

Frost & Sullivan's Analysis of the European Breast Imaging Systems Market evaluated the market for breast screening procedures including x-ray mammography, breast ultrasound, molecular breast imaging (MBI), breast magnetic resonance imaging (MRI) and breast computer-aided detection (CAD). It predicts that market revenues will approach \$1,384.2 million in 2020, up from \$988.3 million in 2013.

### Beyond Mammography

Breast cancer detection is improving through the use of innovative technologies which supplement the industry's "gold standard", mammography. Consequently, more healthcare organisations are considering breast ultrasound, MBI and breast MRI in the diagnosis and treatment of breast cancer. The goal is to minimise false negatives in women whose cancer might go undetected, while also reducing the trauma and expenses associated with false positives.

Raghuraman Madanagopal, a Healthcare Research Analyst for Frost & Sullivan, assessed the situation. "The European market will continue to evolve as breast imaging systems vendors look for innovative technologies to battle the increasing rate of false positives and overcome limitations while scanning women with dense breast tissue. 3-D tomosynthesis, automated breast ultrasound and MBI are the results of such technological innovations that ensure maximum efficiency and minimum error rates."

### Reimbursement Restraints

Despite the advances in imaging modalities, reimbursement is not uniform across European countries. This is especially true for MBI and MRI, two of the more expensive procedures. Mammography and ultrasound are sufficiently reimbursed, presumably due to more common usage of the former and the relatively lower costs of the latter. However, the lack of reliable reimbursement for novel and pricey modalities may dissuade some organisations from adopting the more advanced technologies.

### Multi-Modality Screening

One way that facilities can overcome the reimbursement hurdles while improving efficiency is to take a multi-modality approach to breast cancer screening. The use of more than one type of screening modality has been shown in recent studies to be beneficial in terms of specificity and sensitivity, since the limitations of one modality can be overcome by the advantages of another. According to Madanagopal, "a wise product portfolio will be a core competitive factor in the European breast imaging systems market."

### About the Study

The Analysis of the European Breast Imaging Systems Market study is part of the Growth Partnership Service program of Advanced Medical Technologies. Market participants are extensively interviewed in order to provide detailed reports on industry trends and market opportunities. Related reports in the Frost & Sullivan series are European Ultrasound Market and US Nuclear Medicine and PET Imaging Systems Market.

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