

Digital Pathology - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Digital Pathology Market size is estimated at USD 1.18 billion in 2024, and is expected to reach USD 1.89 billion by 2029, growing at a CAGR of 9.99% during the forecast period (2024-2029).

During the COVID-19 pandemic, government organizations in various countries, research institutes, and many biotech and pharmaceutical firms focused on effective and rapid technologies for the fast diagnosis of COVID-19 and to develop vaccines/new therapeutics to overcome the pandemic situation. The COVID-19 pandemic challenged diagnostic services when many histopathology departments already faced a diminishing workforce and increasing workload. Also, the COVID-19 pandemic in 2020, had a profound impact on routine pathology services. Digital pathology played a key role in safeguarding clinical services and pathology-based research during the pandemic 2020. For instance, according to an article published by BMJ Publishing Group Ltd & Association of Clinical Pathologists, in September 2021, there was a large jump in the number of pathologists employing home offices. And the number of primary diagnoses and consultations done via digital pathology significantly increased. Half of the respondents agreed that digital pathology (DP) had facilitated the maintenance of diagnostic practices. Moreover, the investment in laboratory expansion and market penetration of key manufacturers are likely to propel the market growth. For instance, according to the Department of Health and Human Services (HHS) report in 2022, during the pandemic (March 2020-February 2021), there were more than 28 million visits, which is way higher than pre-pandemic period. Thus, telehealth consultation is expected to boost the market growth.

The increasing number of teleconsultations, rising adoption of digital pathology to enhance lab efficiency, and increasing application in drug discovery and companion diagnostics are driving the digital pathology market. The use of digital pathology in disease diagnosis is also increasing, due to the integration of digital pathology with digital tools, barcoding, specimen tracking, and digital dictation. This also improves the safety, quality, and efficiency of disease diagnoses in pathology laboratories. For

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instance, according to an article published by WHO, in 2022, digital pathology is expected to have enormous potential to make routine pathology practice more efficient and accurate due to ease of use and the ability to work remotely. As per the report published by Deontics Ltd, in September 2022, artificial intelligence (AI)-based assistance systems are boosting image processing in the diagnostic sectors. These intelligent AI systems can employ a variety of algorithms, whether in radiology or pathology, to assist clinicians and specialists, in making quicker and safer judgments.

The market is also expected to be driven by the increasing adoption of telepathology, rising investment in healthcare in developed countries, market penetration of key manufacturers in the developing region, and an increasing focus on drug discovery. For instance, in April 2022, GlaxoSmithKline recruited PathAI to bring digital pathology Artificial intelligence to cancer, Non-alcoholic steatohepatitis (NASH) drug development. Additionally, the 2022 EU4Health work program has been allocated a budget of more than EUR 835 million (USD 706.41 million) to boost health systems in Europe, including around EUR 77 million (USD 65.14 million) for digital investment. The creation of the European health data space, which intends to facilitate a greater exchange and access across member states to health data is likely to receive funds from the digital strand. Such government initiatives associated with the technological advancements in the healthcare IT field along with initiatives by the key player are likely to boost the growth of the market over the forecast period.

Therefore, the factors such as increasing number of teleconsultations, rising adoption of digital pathology to enhance lab efficiency, and increasing application in drug discovery and companion diagnostics are collectively driving the studied market growth over the forecast period. However, factors such as stringent regulatory concerns for primary diagnosis and lack of standard guidelines for digital pathology may impede market growth over the forecast period.

Digital Pathology Market Trends

Disease Diagnosis Segment is Expected to Hold Significant Share Over the Forecast Period

Digital diagnosis plays a prominent role in diagnosing various chronic diseases as it helps determine and understand the cause of diseases. Digital pathology is on the verge of becoming a mainstream option for routine diagnostics. The COVID-19 pandemic and the associated social distancing restrictions boosted the digital pathology market. In January 2022, to advance the COVID-19 diagnostic reporting tools and speed up public use of diagnostic tools, Health and Human Services (HHS) organized a hurried, two-month build cycle using the "TOPx Toolkit" developed by the U.S. Census Bureau with 15 industry-led teams. This made it simpler for people and organizations to report positive/negative test results safely.

Globally, there has been an increasing burden of chronic and infectious diseases such as cardiovascular, cancer, diabetes, influenza, orthopaedic and neurology disorders, leading to disability and negatively impacting people's physical and mental well-being. According to the British Heart Foundation statistics published in January 2022, there were approximately 7.6 million people with heart disease in the United Kingdom due to cardiovascular disorders (CVDs). Due to the rising burden of cardiovascular diseases, there is an increasing demand for innovative technologies diagnosing cardiovascular diseases, thereby driving the market's growth.

The integration of digital pathology with digital tools (barcoding, specimen tracking, and digital dictation) improves the safety, quality, and efficiency of disease diagnosis in pathology laboratories. Digital pathology platform has a provision of instant sharing of whole slides to multiple pathologists, for providing their inputs in a case at a time. For instance, in January 2021, Roche reported CE-IVD launch of its automated digital pathology algorithms, uPath HER2 (4B5) image analysis and uPath HER2 Dual ISH image analysis for breast cancer to help determine the best treatment strategy for each patient. The image analysis algorithms use artificial intelligence to support pathologists in making fast, accurate patient diagnoses of breast cancer. Hence, with the advantages of using digital pathology for disease diagnosis, the segment is expected to grow at a steady rate in the forecast period.

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Hence, owing to the factors such as increasing burden of chronic and infectious diseases and integration of digital pathology, the disease diagnosis segment is estimated to witness significant growth over the forecast period.

North America is Expected to Dominate the Digital Pathology Market Over the Forecast Period

The primary driving factors for the growth of the North American digital pathology market are the growing burden of chronic diseases, rising adoption of technologies in chronic disease management, increasing investments, rising product launches, and initiatives taken by the key market players. The United States within North America is expected to grow significantly during the study period. The rising burden of chronic diseases such as cancer, Alzheimer's disease, and others is expected to boost the digital diagnostics market. For instance, the American Cancer Society, 2022 estimated that about 236,740 new cases of lung cancer will be diagnosed in the country in 2022. The same source also states that 79,000 new cases of kidney cancer will be reported in 2022 from Kidney cancer. Furthermore, the International Diabetes Federation (IDF) published in December 2021, an estimated 14 million adults in Mexico were living with diabetes in 2021. Also, as per a press release by the government of Canada published in August 2021, diabetes is one of the major chronic diseases affecting Canadians where over 3 million Canadians or 8.8% of the population were diagnosed with diabetes and 6.1% of Canadian adults were at high risk of developing diabetes as of August 2021. The high burden of cancer is expected to boost the demand for digital pathology, thereby driving the market growth.

The launch of products and services in the region will also drive the market significantly. For instance, in March 2022, Digital Diagnostics and Baxter International Inc. announced a long-term strategic partnership to help front-line care providers deliver high-quality care and improve care outcomes by offering Digital Diagnostics' IDx-DR autonomous AI software as a diagnostic service combined with the Welch Allyn RetinaVue 700 Imager. This combination can give providers a clear view of diagnostic information valuable for a treatment plan, thus driving the market.

Moreover, strategies such as rising partnerships, expansion, and increasing investments by major players in the market will also boost innovation in the region, thereby boosting the market in the region. For instance, in October 2021, Neuberg Diagnostics expanded its presence in the United States region by launching one of the first laboratory in the United States. The Neuberg Centre for Genomic Medicine (NCGM) will focus on genomic and molecular testing based on next-generation sequencing (NGS) techniques through digital pathology systems.

Thus, owing to the factors such as growing burden of chronic diseases, rising adoption of technologies in chronic disease management, and initiatives taken by the key market players, is expected to drive market growth in North America region during the forecast period.

Digital Pathology Industry Overview

The digital pathology market is consolidated in nature due to the presence of few companies operating globally as well as regionally. The competitive landscape includes an analysis of a few international and local companies that hold the market shares and are well known, including Nikon Corporation, Danaher Corporation (Leica Biosystems Nussloch GmbH), Hamamatsu Photonics KK, Mikrosan Technologies Inc., 3DHitech Ltd, among others.

Additional Benefits:

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

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