Digital Pathology: Technologies and Global Markets

Market Research Report | 2025-04-29 | 170 pages | BCC Research

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Report description:

Description

Report Scope
This report analyzes the digital pathology market, providing forecasted trends and sales projections for this market through 2029. It covers key market players, product segments, supporting technologies, emerging trends, competitive intelligence, major geographies and their competitive landscapes, and it offers regional insights. The report's in-depth analysis of market dynamics and their impact(s) forms the foundation for its qualitative assessments and market estimates.
Digital pathology is the process of converting glass slide samples into digital images to enable electronic analysis, storage and sharing. This conversion, which enhances diagnostic accuracy, collaboration and efficiency by facilitating advanced imaging, computational analysis and telepathology, has revolutionized pathology with data-driven insights and remote consultations.
While this report outlines the conventional processes of pathology laboratories, it does not include market analysis for traditional lab devices such as microscopes and slides. The connectivity and network issues discussed are specific to data and information related to pathology lab diagnoses, excluding broader hospital-based mHealth (Mobile Health) concerns. This report's coverage of telepathology is focused on diagnostic applications, research and development (R&D), and education and training but does not address telemedicine at a broader level.
This report addresses regulatory aspects, including innovations; technological advances (patents and approvals); and the latest trends, preferences and developments in digital pathology. As part of its analysis, it segments the digital pathology market by system, type, application and end user. The market has also been segmented into the following major geographies, North America, Asia-Pacific, Europe and the Rest of the World, and there is focused coverage of countries such as the U.S., Canada, Mexico, France, Germany, the U.K., Italy, Spain, Japan, India, Australia, South Korea and China.
Report Includes
- 91 data tables and 57 additional tables
- An analysis of the global market for digital pathology technologies
- Analyses of global market trends, with data from 2021-2023, estimates for 2024, and projections of compound annual growth

rates (CAGRs) through 2029
- Descriptions of the upcoming market opportunities for the digital pathology market, factors driving its growth, and forecasts for this market's segments and sub-segments
- Estimates of the market size and forecasts for the digital pathology market in value (USD millions) terms, and a corresponding market share analysis by system, type, application, end user and geographic region
- In-depth information regarding major market dynamics, technology updates, new products and applications, and COVID-19's impact on the market for digital pathology
- Coverage of the technological, economic, and business considerations of the global market for digital pathology, with analyses and market forecasts through 2029
- Information on mergers and acquisitions, agreements, collaborations and product launches in the digital pathology industry
- Analysis of relevant patents
- A discussion of the industry's ESG challenges and practices
- Analysis of the competitive landscape for digital pathology companies, and a value share analysis based on their segmental revenues and financial performance
- Profiles of the leading global companies, including F. Hoffmann-La Roche Ltd., 3DHISTECH Ltd., Nikon Instruments Inc., Danaher Corp., and Indica Labs Inc.

Executive Summary

Summary:

The global digital pathology market is expected to grow from $7.8 billion in 2024 and is projected to reach $13.7 billion by the end of 2029, at a compound annual growth rate (CAGR) of 11.9% during the forecast period of 2024 to 2029.

The global digital pathology market is expected to be valued at $13.7 billion by the end of 2029, growing at a CAGR of 11.9%. In 2023, North America held 42.6% of the global market for digital pathology, a share valued at $3.0 billion. The North American market is expected to grow at a CAGR of 12.4%, reaching about $6.0 billion by the end of 2029. The digital pathology market in the Asia-Pacific region is expected to grow at a CAGR of 14.3% during the 2024 through 2029 period. The digital pathology market is rapidly evolving, driven by the need for enhanced lab productivity, cost reduction and artificial intelligence (AI) integration. Digital pathology, telepathology and cloud solutions enable faster
diagnostics, seamless collaboration and real-time data access. These technologies are revolutionizing healthcare delivery particularly in the Asia-Pacific region, where a critical shortage of the pathology services needed for clinical care is driving the adoption of digital pathology. The need for remote diagnostics and virtual education in pathology, because they enable improved access to expert consultations and enhanced training opportunities, has also accelerated the implementation of digital solutions. In North America, a strong commitment to building healthcare infrastructure, a wellestablished R&D ecosystem and supportive regulatory frameworks are the key factors fueling the growth of digital pathology. Artificial intelligence (AI) integration has further expanded its applications, ranging from basic cell detection algorithms for specific cell counting to fully automated analysis of whole slide imaging (WSI), enhancing diagnostic accuracy and efficiency.

For this analysis, the digital pathology market has been segmented based on system, product type, application, end user and geography. Based on system, the market is segmented into digital in vitro diagnostic (IVD) devices, digital pathology (DP) devices, digital pathology analytics, digital communication platforms, digital pathology storage platforms and telepathology systems. The digital IVD devices market segment is further segmented into automated hematology analyzers, blood cell counters, digital holographic microscopy, digital urine sediment analyzers, digital chromosome analyzers, immunohistochemistry image analysis, digital PCR, FISH enumeration systems, digital cytopathology and signet cell detection. The DP devices market segment is further segmented into scanners, robotic microscopes and digital cameras.

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