Anatomic Pathology - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-09-01 | 111 pages | Mordor Intelligence

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Report description:

Anatomic Pathology Market Analysis

The anatomic pathology market size is valued at USD 38.34 billion in 2025 and is projected to reach USD 56.65 billion by 2030, advancing at an 8.12% CAGR. Rising cancer incidence, continued technology upgrades, and wider precision medicine use sustain high test volumes and steady capital spending. Hospitals expand tissue-based diagnostics to support oncology programs while pharmaceutical companies embed companion diagnostics into late-stage trials, creating new revenue layers. Digital slide scanners, laboratory automation, and artificial intelligence cut turnaround time and partially offset staff shortages. Regulatory agencies strengthen quality expectations yet also accelerate clearances for digital pathology, encouraging faster adoption.

Global Anatomic Pathology Market Trends and Insights

Rising Burden of Cancer and Chronic Diseases

Global cancer cases reached 20 million in 2022, with lung cancer alone contributing 2.5 million diagnoses. The American Cancer Society forecasts more than 2 million new US diagnoses and 618,000 deaths in 2025, keeping specimen volumes on an upward curve. Aging populations in developed economies and lifestyle shifts in emerging regions add parallel growth, while screening programs highlight the economic payoff of early detection. These trends drive sustained demand across histology, cytology, and molecular sub-specialties, cementing the anatomic pathology market as an indispensable pillar of oncology care.

Growing Adoption of Precision and Personalized Medicine

Companion diagnostics now sit at the core of many oncology drug launches. In April 2025, Roche received breakthrough device designation for its AI-enabled TROP2 test that guides treatment of non-small-cell lung cancer and unites immunohistochemistry with digital algorithms. The Human Proteome Project confirms identification of 93% of predicted human proteins, broadening the biomarker pool for future assays. Liquid biopsy platforms, including circulating DNA fragmentomics, add non-invasive options with detection limits below 0.32 copies/□L for HPV-driven cancers. Laboratories therefore invest in multiplex staining, next-generation sequencing, and image analysis software to secure this medicine-first revenue stream.

Stringent Regulatory and Accreditation Requirements

The FDA final rule on laboratory-developed tests, effective July 2024, ends decades of enforcement discretion and forces thousands of assays into the medical-device pathway with design control, adverse event reporting, and premarket review obligations. Quality System Regulation revisions harmonize with ISO 13485, requiring broad documentation updates and audits. In Europe, digital pathology guidance from professional societies demands standardized validation and sustainability, adding compliance expense while improving cross-border consistency. US payers simultaneously narrow networks and reduce reimbursement, compounding pressure on smaller labs.

Other drivers and restraints analyzed in the detailed report include:

Continuous Technological Advancements in Pathology Instruments and Automation / Increasing Integration of Digital Pathology and Artificial Intelligence / Shortage of Skilled Pathologists and Histotechnologists /

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

Segment Analysis

Consumables held 46.54% revenue in 2024 because every tissue block requires reagents, stains, and slides. Rising test complexity boosts premium antibody and molecular kit demand, supporting steady incremental growth. Services post the fastest 10.45% CAGR to 2030 as outsourcing gains traction and specialized molecular assays exceed in-house bandwidth. Instruments move in step with lab expansions, with digital scanners and automated stainers mitigating staff gaps and lifting standardization. Quest Diagnostics notes that upfront digital readouts prevent diagnostic delay and improve inter-pathologist collaboration, highlighting efficiency gains.

The anatomic pathology market size for consumables is projected to reach USD 26.4 billion in 2030, equal to 46.6% of total value. In contrast, services are anticipated to account for 34% of the anatomic pathology market size at the end of the forecast horizon due to sustained double-digit growth. Consumable suppliers therefore pursue reagent-lease models, guaranteeing recurring revenue while easing customer capital strain.

The Anatomic Pathology Market Report is Segmented by Product & Services (Instruments, Consumables, and Services), Application (Disease Diagnosis, Drug Discovery & Development, and Other Applications), End User (Hospitals, Diagnostic Laboratories, and More), Geography (North America, Europe, Asia-Pacific, The Middle East and Africa, and South America). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America commanded 41.56% revenue in 2024 owing to high cancer screening rates, established reimbursement, and early digital adoption. US healthcare spending surpasses USD 4 trillion, and pathology influences two-thirds of clinical decisions, solidifying service demand. Workforce programs from the American Society for Clinical Pathology focus on scholarship funding and reimbursement advocacy, though vacancies remain in double digits.

Asia-Pacific delivers the fastest 9.45% CAGR through 2030. China's healthcare outlays reached 8.53 trillion yuan in 2022 and may pass 20 trillion yuan by 2030, boosting laboratory build-outs across provincial centers. Japan embeds AI imaging within routine pathology workflows to cut manual fatigue, and India's diagnostic chains expand into tier-4 towns to capture preventive testing demand. Telepathology pilots link remote hospitals to central labs, improving access without duplicating infrastructure.

Europe shows steady uptake as digital slide standards and quality frameworks gain momentum under the European Society of Pathology. Only 3% of UK departments report full staffing, creating urgency for automated coverslippers and AI triage tools. Middle East & Africa and South America lag on large instrument investment, yet mobile slide scanners and cloud portals are spreading, enabling gradual participation in the anatomic pathology market.

List of Companies Covered in this Report:

Roche / Danaher (Leica Biosystems) / Thermo Fisher Scientific / Agilent Technologies / Sakura Finetek / Quest Diagnostics / LabCorp / NeoGenomics / Cardinal Health / BioGenex / Bio SB / 3DHISTECH / Koninklijke Philips / Ventana Medical Systems / Indica Labs / Hologic (Biocare) / Sysmex / PerkinElmer / OptraSCAN / Hamamatsu Photonics / Microsoft (GigaPath) /

Additional Benefits:

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

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