

Digital Slide Scanners Market Size, Share & Trends Analysis Report By Product (Automated Digital Slide Scanners, Manual Digital Slide Scanners), By Technology, By Application, By Capacity, By End-Use, By Region, And Segment Forecasts, 2025 - 2030

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Abstracts

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Digital Slide Scanners Market Growth & Trends

The global digital slide scanners market size is expected to reach USD 300.07 million by 2030, registering a CAGR of 12.7% from 2025 to 2030, according to a new report by Grand View Research, Inc. The market is undergoing significant transformation, fueled by technological advancements and evolving healthcare needs. The primary growth is driven by the integration of artificial intelligence (AI) and machine learning into scanning systems, which enhances diagnostic accuracy and workflow efficiency. For instance, AI-enabled scanners such as Leica Biosystems' Aperio GT 450 are being used to identify subtle patterns in cancer biopsies, reducing diagnostic turnaround times. Similarly, Hamamatsu Photonics' NanoZoomer scanners employ AI for neurodegenerative disease research, illustrating how these tools bridge the gap between imaging and advanced analytics.

Telepathology and cloud-based solutions are reshaping the market by enabling remote diagnostics and collaborative research. For instance, Philips' IntelliSite platform, it combines high-resolution scanning with cloud connectivity, allowing pathologists in remote areas of India to consult with specialists in urban centers. In Saudi Arabia, institutions like King Faisal Specialist Hospital leverage Sectra's digital pathology systems to share data across the Gulf Cooperation Council (GCC) region, aligning with

national initiatives such as Vision 2030 to modernize healthcare infrastructure. Startups like Proscia and Pathcore are further democratizing access by offering scalable cloud solutions for global clinical trials and multi-site studies.

Affordability and portability are emerging as critical factors, particularly in resource-constrained regions. Compact devices such as Motic's EasyScan One are being deployed in Brazilian public hospitals to expand access to digital pathology, while Precipoint's M8 scanner targets African labs with cost-effective, user-friendly designs. These innovations address infrastructure gaps and support low- to middle-income countries in adopting digital workflows without heavy upfront investments. Automation is another key trend, particularly for high-volume laboratories. Scanners like 3DHistech's Panoramic 1000 streamline processes by handling hundreds of slides daily, which is vital for aging populations in regions like Japan and Europe requiring rapid cancer screenings. This shift toward automation not only improves efficiency but also reduces human error, ensuring consistency in large-scale diagnostic operations.

Government policies and public-private partnerships are accelerating adoption globally. India's Ayushman Bharat Digital Mission, for example, funds digital pathology infrastructure in rural clinics, with companies like SigTuple deploying AI-powered scanners in underserved areas. In the UAE, collaborations between Agilent Technologies and local hospitals are advancing precision oncology, reflecting a broader regional focus on cutting-edge healthcare solutions. Moreover, the pharmaceutical and research sectors are also propelling demand. Digital scanners are now integral to drug discovery, with companies like Pfizer and Novartis using them for high-content screening. Research institutions, including the Mayo Clinic, utilize tools like Hamamatsu's NanoZoomer SQ for neurodegenerative disease studies, while Zeiss' AxiScan.Z1 has been instrumental in COVID-19 tissue analysis, showcasing applications beyond traditional diagnostics.

Regionally, North America remains a hub for innovation, driven by regulatory support for AI-based diagnostic tools. The Asia-Pacific region is witnessing rapid growth, led by China and India, where local manufacturers are scaling production to meet rising demand. In the Middle East and Africa, Saudi Arabia and South Africa are emerging as key markets, supported by telemedicine investments and partnerships aimed at improving diagnostic access.

Challenges such as high costs and data security concerns persist, but innovations in edge computing and blockchain-secured cloud storage are mitigating these issues. Companies like IBM Watson Health are exploring blockchain to ensure secure data

sharing, while edge computing enables localized AI processing, reducing reliance on centralized servers.

Some of the key players in the market are Hamamatsu Photonics, 3DHISTECH, Leica Biosystems (Danaher Corporation), Olympus Corporation, Roche Digital Pathology (Ventana Medical Systems). These players are involved in various strategic initiatives such as product launch and approval in order to cater to a global clientele. For instance, in July 2022, Hamamatsu Photonics introduced the new NanoZoomerS20MD Slide Scanner System. Designed to enhance laboratory workflows, this innovative device provides clinical pathologists with greater flexibility. It complements the existing NanoZoomer MD series by offering a medium-scale digital pathology solution, ideal for priority scanning during peak production periods. Delivering exceptional image quality, the NanoZoomer S20MD incorporates the same pixel pathway as the high-end NanoZoomer S360MD model. Its advanced software suite, including NZAcquireMD for image acquisition and NZViewMD for image viewing, allows users to efficiently create, review, and perform quality checks on whole slide images.

Digital Slide Scanners Market Report Highlights

Based on product, automated digital slide scanners accounted for the largest revenue share of 57.2% in 2024. The increasing workload on pathologists has created a demand for these solutions that minimize manual intervention while ensuring diagnostic accuracy. Automated digital slide scanners optimize pathology workflows by enabling rapid scanning, real-time image analysis, and remote accessibility, improving efficiency and expanding access to pathology services.

Based on technology, brightfield scanners dominated the market and accounted for the largest share of 69.9% in 2024. The increasing prevalence of cancer and other tissue-related diseases has driven demand for advanced diagnostic tools, making brightfield scanners a crucial component in modern pathology. As workloads rise, laboratories seek high-throughput scanners capable of rapidly digitizing large volumes of slides without compromising image quality. The transition to digital pathology and telepathology has further accelerated adoption, facilitating remote diagnostics, expert collaboration, and seamless integration with AI-powered analysis tools.

Based on application, the clinical diagnostics segment dominated the market

and accounted for the largest share of 42.9% in 2024. The rising prevalence of chronic diseases, especially cancer, has driven the need for rapid and accurate histopathological analysis, accelerating the shift toward digital pathology. The increasing adoption of AI-powered diagnostic tools has further propelled market growth by enabling automated pattern recognition, anomaly detection, and predictive analytics. Additionally, regulatory approvals for primary digital diagnosis, such as FDA clearance for whole slide imaging systems, have reinforced confidence in digital scanners for clinical applications. These advancements have streamlined workflows, improved diagnostic accuracy, and expanded the role of digital pathology in modern healthcare.

Based on capacity, Scanner 61-299 slides capacity segment dominated with the largest market share of 47.85% in 2024. The medium-capacity scanner segment (61–299 slides) is gaining traction in digital pathology, serving hospitals, diagnostic labs, and research institutions that need efficient whole slide imaging. These scanners offer a cost-effective, automated solution for mid-to-large-scale pathology operations adopting digital workflows while maintaining high-speed performance and image quality.

Based on end use, hospitals & clinical pathology labs segment dominated the end use segments with the largest market share of 36.44% in 2024. As the global incidence of cancer and other tissue-related diseases continues to rise, hospitals increasingly rely on high-speed, high-throughput solutions to handle growing case volumes effectively.

North America dominated the global market due to the presence of a large number of major market players, coupled with regulatory changes. These advancements are driving the development of more accurate and minimally invasive diagnostic tests.

Asia Pacific region is expected to witness the fastest growth with a CAGR of 13.7% over the forecast period from 2024 to 2030, due to the presence of manufacturers with innovative device manufacturing capabilities coupled with accelerated diagnostic research capabilities.

Contents

CHAPTER 1. METHODOLOGY AND SCOPE

- 1.1. Market Segmentation & Scope
- 1.2. Segment Definitions
 - 1.2.1. Product
 - 1.2.2. Technology
 - 1.2.3. Application
 - 1.2.4. Capacity
 - 1.2.5. End Use
 - 1.2.6. Regional scope
 - 1.2.7. Estimates and forecasts timeline.
- 1.3. Research Methodology
- 1.4. Information Procurement
 - 1.4.1. Purchased database
 - 1.4.2. GVR's internal database
 - 1.4.3. Secondary sources
 - 1.4.4. Primary research
 - 1.4.5. Details of primary research
- 1.5. Information or Data Analysis
 - 1.5.1. Data analysis models
- 1.6. Market Formulation & Validation
- 1.7. Model Details
 - 1.7.1. Commodity flow analysis (Model 1)
 - 1.7.2. Approach 1: Commodity flow approach
 - 1.7.3. Volume price analysis (Model 2)
 - 1.7.4. Approach 2: Volume price analysis
- 1.8. List of Secondary Sources
- 1.9. List of Primary Sources
- 1.10. Objectives

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. Market Outlook
- 2.2. Segment Outlook
 - 2.2.1. Product outlook
 - 2.2.2. Technology outlook
 - 2.2.3. Application outlook

- 2.2.4. Capacity outlook
- 2.2.5. End Use outlook
- 2.2.6. Regional outlook
- 2.3. Competitive Insights

CHAPTER 3. DIGITAL SLIDE SCANNERS MARKET VARIABLES, TRENDS & SCOPE

- 3.1. Market Lineage Outlook
 - 3.1.1. Parent market outlook
 - 3.1.2. Related/ancillary market outlook.
- 3.2. Market Dynamics
 - 3.2.1. Market driver analysis
 - 3.2.1.1. Increasing adoption of digital pathology in clinical and research settings
 - 3.2.1.2. Advancements in AI-powered image analysis for improved diagnostics
 - 3.2.1.3. Growing prevalence of cancer and other chronic diseases
 - 3.2.1.4. Rising demand for remote pathology and telemedicine solutions
 - 3.2.1.5. Government initiatives supporting digital healthcare transformation
 - 3.2.2. Market restraint analysis
 - 3.2.2.1. High initial investment and maintenance costs
- 3.3. Digital Slide Scanners Market Analysis Tools
 - 3.3.1. Industry Analysis - Porter's
 - 3.3.2. PESTEL Analysis

CHAPTER 4. DIGITAL SLIDE SCANNERS MARKET: PRODUCT ESTIMATES & TREND ANALYSIS

- 4.1. Segment Dashboard
- 4.2. Digital Slide Scanners Market: Product Movement Analysis
- 4.3. Digital Slide Scanners Market Size & Trend Analysis, by diagnostic technique, 2018 to 2030 (USD Million)
- 4.4. Automated Digital Slide Scanners
 - 4.4.1. Automated Digital Slide Scanners Market Revenue Estimates and Forecasts, 2018 - 2030 (USD Million)
- 4.5. Manual Digital Slide Scanners
 - 4.5.1. Manual Digital Slide Scanners Market Revenue Estimates and Forecasts, 2018 - 2030 (USD Million)

CHAPTER 5. DIGITAL SLIDE SCANNERS MARKET: TECHNOLOGY ESTIMATES &

TREND ANALYSIS

- 5.1. Technology Market Share, 2024 & 2030
- 5.2. Segment Dashboard
- 5.3. Global Digital Slide Scanners Market by Technology Outlook
- 5.4. Market Size & Forecasts and Trend Analyses, 2018 to 2030 for the following
- 5.5. Brightfield Scanners
 - 5.5.1. Brightfield Scanners Market estimates and forecasts 2018 to 2030 (USD Million)
- 5.6. Fluorescence Scanners
 - 5.6.1. Fluorescence Scanners Market estimates and forecasts 2018 to 2030 (USD Million)

CHAPTER 6. DIGITAL SLIDE SCANNERS MARKET: APPLICATION ESTIMATES & TREND ANALYSIS

- 6.1. Application Market Share, 2024 & 2030
- 6.2. Segment Dashboard
- 6.3. Global Digital Slide Scanners Market by Application Outlook
- 6.4. Market Size & Forecasts and Trend Analyses, 2018 to 2030 for the following
- 6.5. Clinical Diagnostics
 - 6.5.1. Clinical Diagnostics Market estimates and forecasts 2018 to 2030 (USD Million)
- 6.6. Research & Drug Discovery
 - 6.6.1. Research & Drug Discovery Market estimates and forecasts 2018 to 2030 (USD Million)
- 6.7. Forensic Pathology
 - 6.7.1. Forensic Pathology Market estimates and forecasts 2018 to 2030 (USD Million)
- 6.8. Others
 - 6.8.1. Others Market estimates and forecasts 2018 to 2030 (USD Million)

CHAPTER 7. DIGITAL SLIDE SCANNERS MARKET: CAPACITY ESTIMATES & TREND ANALYSIS

- 7.1. Capacity Market Share, 2024 & 2030
- 7.2. Segment Dashboard
- 7.3. Global Digital Slide Scanners Market by Capacity Outlook
- 7.4. Market Size & Forecasts and Trend Analyses, 2018 to 2030 for the following
- 7.5. Scanner 1-60 slides capacity
 - 7.5.1. Scanner 1-60 slides capacity Market estimates and forecasts 2018 to 2030 (USD Million)

7.6. Scanner 61-299 slides capacity

7.6.1. Scanner 61-299 slides capacity Market estimates and forecasts 2018 to 2030 (USD Million)

7.7. Scanner >300 slides capacity

7.7.1. Scanner >300 slides capacity Market estimates and forecasts 2018 to 2030 (USD Million)

CHAPTER 8. DIGITAL SLIDE SCANNERS MARKET: END USE ESTIMATES & TREND ANALYSIS

8.1. End Use Market Share, 2024 & 2030

8.2. Segment Dashboard

8.3. Global Digital Slide Scanners Market by End Use Outlook

8.4. Market Size & Forecasts and Trend Analyses, 2018 to 2030 for the following

8.5. Hospitals & Clinical Pathology Labs

8.5.1. Hospitals & Clinical Pathology Labs Market estimates and forecasts 2018 to 2030 (USD Million)

8.6. Biopharmaceutical & Biotech Companies

8.6.1. Biopharmaceutical & Biotech Companies Market estimates and forecasts 2018 to 2030 (USD Million)

8.7. Academic and Research Institutes

8.7.1. Academic and Research Institutes Market estimates and forecasts 2018 to 2030 (USD Million)

8.8. Contract Research Organizations (CROs)

8.8.1. Contract Research Organizations (CROs) Market estimates and forecasts 2018 to 2030 (USD Million)

CHAPTER 9. DIGITAL SLIDE SCANNERS MARKET: REGIONAL ESTIMATES & TREND ANALYSIS

9.1. Regional Market Share Analysis, 2024 & 2030

9.2. Regional Market Dashboard

9.3. Global Regional Market Snapshot

9.4. Market Size, & Forecasts Trend Analysis, 2018 to 2030:

9.5. North America

9.5.1. North America: SWOT Analysis

9.5.2. U.S.

9.5.2.1. Key country dynamics

9.5.2.2. Regulatory framework/Reimbursement

- 9.5.2.3. Competitive scenario
- 9.5.2.4. U.S. market estimates and forecasts 2018 to 2030 (USD Million)
- 9.5.3. Canada
 - 9.5.3.1. Key country dynamics
 - 9.5.3.2. Regulatory framework/Reimbursement
 - 9.5.3.3. Competitive scenario
 - 9.5.3.4. Canada market estimates and forecasts 2018 to 2030 (USD Million)
- 9.5.4. Mexico
 - 9.5.4.1. Key country dynamics
 - 9.5.4.2. Regulatory framework/Reimbursement
 - 9.5.4.3. Competitive scenario
 - 9.5.4.4. Mexico market estimates and forecasts 2018 to 2030 (USD Million)
- 9.6. Europe
 - 9.6.1. Europe: SWOT Analysis
 - 9.6.2. UK
 - 9.6.2.1. Key country dynamics
 - 9.6.2.2. Regulatory framework/Reimbursement
 - 9.6.2.3. Competitive scenario
 - 9.6.2.4. UK market estimates and forecasts 2018 to 2030 (USD Million)
 - 9.6.3. Germany
 - 9.6.3.1. Key country dynamics
 - 9.6.3.2. Regulatory framework/Reimbursement
 - 9.6.3.3. Competitive scenario
 - 9.6.3.4. Germany market estimates and forecasts 2018 to 2030 (USD Million)
 - 9.6.4. France
 - 9.6.4.1. Key country dynamics
 - 9.6.4.2. Regulatory framework/Reimbursement
 - 9.6.4.3. Competitive scenario
 - 9.6.4.4. France market estimates and forecasts 2018 to 2030 (USD Million)
 - 9.6.5. Italy
 - 9.6.5.1. Key country dynamics
 - 9.6.5.2. Regulatory framework/Reimbursement
 - 9.6.5.3. Competitive scenario
 - 9.6.5.4. Italy market estimates and forecasts 2018 to 2030 (USD Million)
 - 9.6.6. Spain
 - 9.6.6.1. Key country dynamics
 - 9.6.6.2. Regulatory framework/Reimbursement
 - 9.6.6.3. Competitive scenario
 - 9.6.6.4. Spain market estimates and forecasts 2018 to 2030 (USD Million)

9.6.7. Norway

- 9.6.7.1. Key country dynamics
- 9.6.7.2. Regulatory framework/Reimbursement
- 9.6.7.3. Competitive scenario
- 9.6.7.4. Norway market estimates and forecasts 2018 to 2030 (USD Million)

9.6.8. Sweden

- 9.6.8.1. Key country dynamics
- 9.6.8.2. Regulatory framework/Reimbursement
- 9.6.8.3. Competitive scenario
- 9.6.8.4. Sweden market estimates and forecasts 2018 to 2030 (USD Million)

9.6.9. Denmark

- 9.6.9.1. Key country dynamics
- 9.6.9.2. Regulatory framework/Reimbursement
- 9.6.9.3. Competitive scenario
- 9.6.9.4. Denmark market estimates and forecasts 2018 to 2030 (USD Million)

9.7. Asia Pacific

9.7.1. Asia Pacific: SWOT Analysis

9.7.2. Japan

- 9.7.2.1. Key country dynamics
- 9.7.2.2. Regulatory framework/Reimbursement
- 9.7.2.3. Competitive scenario
- 9.7.2.4. Japan market estimates and forecasts 2018 to 2030 (USD Million)

9.7.3. China

- 9.7.3.1. Key country dynamics
- 9.7.3.2. Regulatory framework/Reimbursement
- 9.7.3.3. Competitive scenario
- 9.7.3.4. China market estimates and forecasts 2018 to 2030 (USD Million)

9.7.4. India

- 9.7.4.1. Key country dynamics
- 9.7.4.2. Regulatory framework/Reimbursement
- 9.7.4.3. Competitive scenario
- 9.7.4.4. India market estimates and forecasts 2018 to 2030 (USD Million)

9.7.5. Australia

- 9.7.5.1. Key country dynamics
- 9.7.5.2. Regulatory framework/Reimbursement
- 9.7.5.3. Competitive scenario
- 9.7.5.4. Australia market estimates and forecasts 2018 to 2030 (USD Million)

9.7.6. South Korea

- 9.7.6.1. Key country dynamics

- 9.7.6.2. Regulatory framework/Reimbursement
- 9.7.6.3. Competitive scenario
- 9.7.6.4. South Korea market estimates and forecasts 2018 to 2030 (USD Million)
- 9.7.7. Thailand
 - 9.7.7.1. Key country dynamics
 - 9.7.7.2. Regulatory framework/Reimbursement
 - 9.7.7.3. Competitive scenario
 - 9.7.7.4. Thailand market estimates and forecasts 2018 to 2030 (USD Million)
- 9.8. Latin America
 - 9.8.1. Latin America: SWOT Analysis
 - 9.8.2. Brazil
 - 9.8.2.1. Key country dynamics
 - 9.8.2.2. Regulatory framework/Reimbursement
 - 9.8.2.3. Competitive scenario
 - 9.8.2.4. Brazil market estimates and forecasts 2018 to 2030 (USD Million)
 - 9.8.3. Argentina
 - 9.8.3.1. Key country dynamics
 - 9.8.3.2. Regulatory framework/Reimbursement
 - 9.8.3.3. Competitive scenario
 - 9.8.3.4. Argentina market estimates and forecasts 2018 to 2030 (USD Million)
- 9.9. MEA
 - 9.9.1. MEA: SWOT Analysis
 - 9.9.2. South Africa
 - 9.9.2.1. Key country dynamics
 - 9.9.2.2. Regulatory framework/Reimbursement
 - 9.9.2.3. Competitive scenario
 - 9.9.2.4. South Africa market estimates and forecasts 2018 to 2030 (USD Million)
 - 9.9.3. Saudi Arabia
 - 9.9.3.1. Key country dynamics
 - 9.9.3.2. Regulatory framework/Reimbursement
 - 9.9.3.3. Competitive scenario
 - 9.9.3.4. Saudi Arabia market estimates and forecasts 2018 to 2030 (USD Million)
 - 9.9.4. UAE
 - 9.9.4.1. Key country dynamics
 - 9.9.4.2. Regulatory framework/Reimbursement
 - 9.9.4.3. Competitive scenario
 - 9.9.4.4. UAE market estimates and forecasts 2018 to 2030 (USD Million)
 - 9.9.5. Kuwait
 - 9.9.5.1. Key country dynamics

- 9.9.5.2. Regulatory framework
- 9.9.5.3. Competitive scenario
- 9.9.5.4. Kuwait market estimates and forecasts 2018 to 2030 (USD Million)

CHAPTER 10. COMPETITIVE LANDSCAPE

- 10.1. Recent Developments & Impact Analysis, By Key Market Participants
- 10.2. Company/Competition Categorization
- 10.3. Vendor Landscape
 - 10.3.1. List of key distributors and channel partners
 - 10.3.2. Key customers
 - 10.3.3. Key company market share analysis, 2024
 - 10.3.4. Hamamatsu Photonics
 - 10.3.4.1. Company overview
 - 10.3.4.2. Financial performance
 - 10.3.4.3. Services benchmarking
 - 10.3.4.4. Strategic initiatives
 - 10.3.5. 3DHISTECH
 - 10.3.5.1. Company overview
 - 10.3.5.2. Financial performance
 - 10.3.5.3. Services benchmarking
 - 10.3.5.4. Strategic initiatives
 - 10.3.6. F. Hoffmann-La Roche Ltd.
 - 10.3.6.1. Company overview
 - 10.3.6.2. Financial performance
 - 10.3.6.3. Services benchmarking
 - 10.3.6.4. Strategic initiatives
 - 10.3.7. Leica Biosystems (Danaher Corporation)
 - 10.3.7.1. Company overview
 - 10.3.7.2. Financial performance
 - 10.3.7.3. Services benchmarking
 - 10.3.7.4. Strategic initiatives
 - 10.3.8. Olympus Corporation
 - 10.3.8.1. Company overview
 - 10.3.8.2. Financial performance
 - 10.3.8.3. Services benchmarking
 - 10.3.8.4. Strategic initiatives
 - 10.3.9. Indica Labs
 - 10.3.9.1. Company overview

- 10.3.9.2. Financial performance
- 10.3.9.3. Services benchmarking
- 10.3.9.4. Strategic initiatives
- 10.3.10. Koninklijke Philips N.V.
 - 10.3.10.1. Company overview
 - 10.3.10.2. Financial performance
 - 10.3.10.3. Services benchmarking
 - 10.3.10.4. Strategic initiatives
- 10.3.11. Paige.AI
 - 10.3.11.1. Company overview
 - 10.3.11.2. Financial performance
 - 10.3.11.3. Services benchmarking
 - 10.3.11.4. Strategic initiatives
- 10.3.12. Huron Digital Pathology
 - 10.3.12.1. Company overview
 - 10.3.12.2. Financial performance
 - 10.3.12.3. Services benchmarking
 - 10.3.12.4. Strategic initiatives
- 10.3.13. Lntheus Grundium
 - 10.3.13.1. Company overview
 - 10.3.13.2. Financial performance
 - 10.3.13.3. Services benchmarking
 - 10.3.13.4. Strategic initiatives

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