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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

https://marketpublishers.com/r/D15DB1A834C7EN.html
Date: March 2025
Pages: 150
Price: US$ 5,950.00 (Single User License)
ID: D15DB1A834C7EN

Abstracts

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Digital Slide Scanners Market Growth & Trends

The global digital slide scanners market size is expected treach USD 300.07 million by 2030, registering a CAGR of 12.7% from 2025 t2030, according ta new report by Grand View Research, Inc. The market is undergoing significant transformation, fueled by technological advancements and evolving healthcare needs. The primarily growth is driven by the integration of artificial intelligence (AI) and machine learning intscanning systems, which enhances diagnostic accuracy and workflow efficiency. For instance, AI-enabled scanners such as Leica Biosystems' AperiGT 450 are being used tidentify 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 tconsult with specialists in urban centers. In Saudi Arabia, institutions like King Faisal Specialist Hospital leverage Sectra's digital pathology systems tshare data across the Gulf Cooperation Council (GCC) region, aligning with

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national initiatives such as Vision 2030 tmodernize 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 texpand access tdigital pathology, while Precipoint's M8 scanner targets African labs with cost-effective, user-friendly designs. These innovations address infrastructure gaps and support low- tmiddle-income countries in adopting digital workflows without heavy upfront investments. Automation is another key trend, particularly for high-volume laboratories. Scanners like 3DHistech's Pannoramic 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 alsreduces 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 tunderserved 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 alspropelling demand. Digital scanners are now integral tdrug discovery, with companies like Pfizer and Novartis using them for high-content screening. Research institutions, including the MayClinic, 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 tmeet 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 tensure secure data

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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 tcater ta global clientele. For instance, in July 2022, Hamamatsu Photonics introduced the new NanoZoomerS20MD Slide Scanner System Designed tenhance 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 tefficiently 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 tpathology 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 tdigital 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

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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 trise, hospitals increasingly rely on high-speed, high-throughput solutions thandle growing case volumes effectively.

North America dominated the global market due tthe 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 twitness the fastest growth with a CAGR of 13.7% over the forecast period from 2024 t2030, due tpresence of manufacturers with innovative devices manufacturing capabilities coupled with accelerated diagnostic research capabilities.

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CHAPTER 10. COMPETITIVE LANDSCAPE

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