

Global Whole Slide Imaging (WSI) Market (2018 - 2023)

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Abstracts

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Digital pathology continues to evolve, driven by advancements in technology, software and cloud storage solutions. Digital imaging has shifted from acquiring of static images to whole slide imaging (WSI), resulting in its increased use in pathology. WSI, which is referred to as virtual microscopy, is an emerging technology that involves the acquisition of high-resolution digital images representing entire tissue sections from glass slides on a computer monitor. WSI systems aid pathologists in primary diagnosis, consultation and remote interpretation of frozen sections. The global WSI market is expected to reach USD 995 Mn by 2023, expanding at a CAGR of 14.95% during 2018-2023.

The global WSI market is categorized based on components, applications, and end users. Based on components, the market is segmented into hardware (slide scanners, communication devices, storage devices, and others) and software. Based on applications, the market is fragmented into diagnostics, education, and research purposes. Based on end users, the market is segmented into pharmaceutical and biotechnology companies, academic and research institutes, and hospitals and reference laboratories.

Component segment insights:

Based on components, the hardware segment will experience a CAGR of 14% through the forecasted period of 2018-2023, and will occupy ~72% of the market by 2023. The software segment is expected to witness a CAGR of 17% through the forecasted period of 2018-2023, and account for the rest of the market by 2023. Rising demand for high-speed and high-resolution digital image in pathological laboratories, workflow efficiency, patient safety, and diagnostic accuracy, have propelled the demand for WSI systems.

Application segment insights:

The research segment held the largest market share of 73% in 2018, owing to the high demand for WSI in drug discoveries and oncology research. In 2016, around 1.7 Mn cases of cancer were diagnosed in the U.S. Thus, the need for improvement in cancer diagnosis is another important factor that is anticipated to further boost the demand for WSI systems across the globe.

End user segment insights:

Although the pharmaceutical and biotechnology companies segment held the largest market share of nearly 68% in 2018, the hospitals and reference laboratories segment is expected to witness the highest growth rate of 51% throughout the forecasted period. This tremendous growth is attributed to the Food and Drug Administration's (FDA) approval for the first whole slide imaging (WSI) system (Philips IntelliSite Pathology Solution [PIPS]), which is to be marketed for primary diagnosis. This has provided an impetus to increased clinical use of whole slide imaging in the U.S.

Regional segment insights:

On the basis of regions, the market is segmented into North America, Europe, Asia-Pacific, Latin America, and the Middle East and Africa. North America has the largest market share. In 2018, the region accounted for an approximately 44% share of the global market. Approval from the FDA and continuous support from the Digital Pathology Association (DPA) to increase focus on education, best practices and awareness, have boosted the adoption of WSI for various applications in North America.

Companies covered:

1. Ventana Medical Systems, Inc. (Roche)
2. Leica Biosystems
3. Philips Healthcare
4. Inspirata (GE Healthcare)
5. Olympus Corporation
6. Hamamatsu Photonics K.K.
7. 3DHISTECH
8. Huron Digital Pathology Inc
9. Omnyx LLC
10. Visiopharm A/S

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Contents

CHAPTER 1. EXECUTIVE SUMMARY

- 1.1. Market scope and segmentation
- 1.2. Key questions answered
 - 1.3.1. Executive summary – I
 - 1.3.2. Executive summary – II
 - 1.3.3. Executive summary – III
 - 1.3.4. Executive summary – IV
 - 1.3.5. Executive summary – V
 - 1.3.6. Executive summary – VI

CHAPTER 2. GLOBAL WHOLE SLIDE IMAGING MARKET – OVERVIEW

- 2.1. Global market overview historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), geography wise market revenue (USD bn), and key market observations
- 2.2. Global market drivers
- 2.3. Global market trends
- 2.4. Value chain analysis
- 2.5. Porter's five forces analysis

CHAPTER 3. NORTH AMERICA WHOLE SLIDE IMAGING MARKET

- 3.1. Regional market overview historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 3.2. Market segmentation based on components of whole slide imaging (hardware [slide scanner, storage and other components] and software) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 3.3. Market segmentation based on applications of whole slide imaging (diagnostic, educational and research purpose) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 3.4. Market segmentation based on end user of whole slide imaging (pharmaceutical and biotechnology companies, academic and research institutes, and hospitals and reference laboratories) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations

CHAPTER 4. EUROPE WHOLE SLIDE IMAGING MARKET

- 4.1. Regional market overview historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 4.2. Market segmentation based on components of whole slide imaging (hardware [slide scanner, storage and other components] and software) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 4.3. Market segmentation based on applications of whole slide imaging (diagnostic, educational and research purpose) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 4.4. Market segmentation based on end user of whole slide imaging (pharmaceutical and biotechnology companies, academic and research institutes, and hospitals and reference laboratories) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations

CHAPTER 5. ASIA-PACIFIC WHOLE SLIDE IMAGING MARKET

- 5.1. Regional market overview historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 5.2. Market segmentation based on components of whole slide imaging (hardware [slide scanner, storage and other components] and software) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 5.3. Market segmentation based on applications of whole slide imaging (diagnostic, educational and research purpose) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 5.4. Market segmentation based on end user of whole slide imaging (pharmaceutical and biotechnology companies, academic and research institutes, and hospitals and reference laboratories) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations

CHAPTER 6. LATIN AMERICA WHOLE SLIDE IMAGING MARKET

- 6.1. Regional market overview historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 6.2. Market segmentation based on components of whole slide imaging (hardware [slide scanner, storage and other components] and software) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 6.3. Market segmentation based on applications of whole slide imaging (diagnostic, educational and research purpose) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations
- 6.4. Market segmentation based on end user of whole slide imaging (pharmaceutical

and biotechnology companies, academic and research institutes, and hospitals and reference laboratories) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations

CHAPTER 7. THE MIDDLE EAST AND AFRICA WHOLE SLIDE IMAGING MARKET

7.1. Regional market overview historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations

7.2. Market segmentation based on components of whole slide imaging (hardware [slide scanner, storage and other components] and software) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations

7.3. Market segmentation based on applications of whole slide imaging (diagnostic, educational and research purpose) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations

7.4. Market segmentation based on end user of whole slide imaging (pharmaceutical and biotechnology companies, academic and research institutes, and hospitals and reference laboratories) historical (2015-2017) and forecasted (2018-2023) market size (USD Bn), and key market observations

CHAPTER 8. COMPETITIVE LANDSCAPE

8.1. Ventana Medical Systems, Inc (Roche)

- Company snapshot
- Product and services
- Global presence
- Major initiatives/highlights
- Key numbers
- Growth strategy

8.2. Leica Biosystems

- Company snapshot
- Product and services
- Global presence
- Major initiatives/highlights
- Key numbers
- Growth strategy

8.3. Philips Healthcare

- Company snapshot
- Product and services
- Global presence

Major initiatives/highlights

Key numbers

Growth strategy

8.4. Inspirata (GE Healthcare)

Company snapshot

Product and services

Global presence

Major initiatives/highlights

Key numbers

Growth strategy

8.5. Olympus Corporation

Company snapshot

Product and services

Global presence

Major initiatives/highlights

Key numbers

Growth strategy

8.6. Hamamatsu Photonics K.K.

Company snapshot

Product and services

Global presence

Major initiatives/highlights

Key numbers

Growth strategy

8.7. 3DHISTECH

Company snapshot

Product and services

Global presence

Major initiatives/highlights

Key numbers

Growth strategy

8.8. Huron Digital Pathology Inc.

Company snapshot

Product and services

Global presence

Major initiatives/highlights

Key numbers

Growth strategy

8.9. Omnyx LLC

Company snapshot
Product and services
Global presence
Major initiatives/highlights
Key numbers
Growth strategy

8.10. Visiopharm A/S

Company snapshot
Product and services
Global presence
Major initiatives/highlights
Key numbers
Growth strategy

CHAPTER 9 CONCLUSION

9.1. Future outlook

Appendix

1. List of tables
2. Research methodology
3. Assumptions
4. About Netscribes Inc.

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