

# **Breast Cancer Diagnostics Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type**

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## **Abstracts**

### **Digital Pathology Market Summary**

#### **Introduction and Market Overview**

Digital pathology involves the digitization of pathology slides for analysis, storage, and sharing, leveraging high-resolution imaging and AI to enhance diagnostic accuracy, particularly for breast cancer, which saw 2.3 million new cases and 670,000 deaths in 2022. The market is driven by the need for early cancer detection, with WHO's Global Breast Cancer Initiative targeting a 2.5% annual mortality reduction by 2040. An aging population, projected to reach 2.1 billion by 2050, and lifestyle factors like obesity increase breast cancer risk, boosting demand for liquid biopsy and gene expression assays. Digital pathology reduces diagnostic errors, with AI algorithms achieving high accuracy in detecting genetic markers like BRCA1/2. The global digital pathology market is estimated at USD 700-1,100 million in 2025, with a CAGR of 15.5%-20.3% through 2030.

#### **Regional Market Trends**

North America: The U.S. leads with advanced genomic testing infrastructure, while Canada focuses on telepathology for rural diagnostics.

Europe: Germany, France, and the UK drive growth with national screening programs, emphasizing precision diagnostics.

Asia Pacific: China and India see rapid demand due to high breast cancer prevalence, with Japan prioritizing AI-driven pathology.

Rest of the World: Brazil expands screening in public health systems, while the Middle East invests in cancer diagnostics infrastructure.

## Application Analysis

Hospitals: Expected growth of 15.8%-20.6%, driven by diagnostic needs. Trends focus on AI-integrated workflows.

Biotech & Pharma Companies: Projected growth of 15.5%-20.3%, linked to drug development. Advances emphasize companion diagnostics.

Diagnostic Labs: Anticipated growth of 15.7%-20.5%, tied to high-throughput screening. Trends highlight automation.

Academic & Research Institutes: Expected growth of 15.3%-20.1%, supporting genomic research. Developments prioritize data sharing platforms.

## Type Analysis

Software: Expected growth of 16.0%-20.8%, valued for AI-driven analysis. Trends focus on cloud-based platforms.

Device: Projected growth of 15.5%-20.3%, linked to high-resolution scanners. Advances emphasize portability.

Storage System: Anticipated growth of 15.0%-19.8%, supporting large-scale data management. Trends highlight secure cloud storage.

## Key Market Players

Leica Biosystems: Provides high-resolution pathology scanners.

Roche Diagnostics: Offers AI-driven diagnostic assays.

Philips: Develops end-to-end digital pathology solutions.

Hamamatsu Photonics: Specializes in imaging technology.

PathAI: Focuses on AI-powered pathology analytics.

### Porter's Five Forces Analysis

Threat of New Entrants: Moderate, due to high costs for scanners and AI development, but open-source software lowers barriers.

Threat of Substitutes: Low, as traditional pathology lacks digital efficiency, though manual methods persist in low-resource areas.

Bargaining Power of Buyers: Moderate, with labs seeking cost-effective solutions, but specialized AI tools limit options.

Bargaining Power of Suppliers: Low, with multiple providers of imaging and software components.

Competitive Rivalry: High, with players competing on AI accuracy and interoperability.

### Market Opportunities and Challenges

#### Opportunities:

Addressing breast cancer, with 2.3 million cases annually, using liquid biopsy assays.

Supporting an aging population with high cancer risk.

Leveraging WHO's initiative for early detection, reducing mortality by 2.5% yearly.

Utilizing NGS and liquid biopsy for cost-effective diagnostics.

Aligning with national screening programs in 70+ countries.

Supporting research with assays for BRCA1/2 and HER2 markers.

#### Challenges:

High costs of scanners and genomic assays.

Regulatory delays, with FDA approvals taking 1-2 years.

Limited access in low-income regions, where 70% of deaths occur.

Data privacy concerns, requiring GDPR compliance.

Need for pathologist training in digital tools.

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