

AI in Pathology – Diagnostic Automation Market Forecasts to 2032 – Global Analysis by Component (Software, Hardware and Services), Deployment Mode (On-premise, Cloud-based and Hybrid), Technology, Application, End User and Geography

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Abstracts

According to Statistics MRC, the Global AI in Pathology – Diagnostic Automation Market is accounted for \$869.7 billion in 2025 and is expected to reach \$3264.8 billion by 2032 growing at a CAGR of 20.8% during the forecast period. AI in Pathology—Diagnostic Automation uses artificial intelligence to analyze pathology images, streamline workflows, and support diagnostic decisions. It automates repetitive tasks like slide screening and image quantification, improving accuracy and efficiency. By integrating machine learning with digital pathology tools, it helps pathologists detect diseases faster and with greater precision, ultimately enhancing patient outcomes and enabling more scalable, data-driven diagnostics in modern healthcare.

According to The Guardian, a University of Cambridge AI algorithm analysed 4,000+ duodenal biopsy images and diagnosed coeliac disease almost instantly, compared to the 5–10 minutes a human pathologist takes per case.

Market Dynamics:

Driver:

Increasing adoption of digital pathology

Healthcare institutions are increasingly investing in whole slide imaging scanners and digital infrastructure to enhance diagnostic accuracy and workflow efficiency. This

transformation enables pathologists to analyze tissue samples remotely, facilitating telepathology consultations and second opinions across geographical boundaries. Furthermore, digital pathology creates the essential foundation for AI algorithm deployment, as machine learning models require digitized histopathological images for training and validation. The integration of AI with digital pathology platforms significantly reduces diagnostic review time while improving consistency in pathological assessments.

Restraint:

Lack of standardized data

The absence of standardized data protocols poses a significant challenge to AI implementation in pathology diagnostics. Variability in tissue preparation, staining procedures, and imaging parameters across different laboratories creates inconsistencies that can compromise AI model performance. Additionally, the lack of uniform annotation standards for pathological images hinders the development of robust training datasets required for accurate AI algorithms. Moreover, the scarcity of high-quality, annotated datasets limits the effectiveness of deep learning models and their applicability across diverse patient populations and disease types.

Opportunity:

Integration with multi-omics data and precision medicine

The convergence of AI pathology with multi-omics data presents unprecedented opportunities for personalized healthcare delivery. By combining histopathological image analysis with genomic, proteomic, and metabolomic information, AI systems can provide comprehensive disease characterization and treatment recommendations. This integration enables the identification of novel biomarkers and therapeutic targets, particularly valuable in oncology applications where precision medicine approaches are increasingly adopted. Furthermore, the growing emphasis on personalized medicine creates substantial market opportunities for AI solutions that can seamlessly integrate diverse data types to support clinical decision-making processes.

Threat:

Data bias and generalizability issues

Data bias represents a critical threat to the widespread adoption of AI in pathology diagnostics, as algorithms trained on non-representative datasets may produce unreliable results across different patient populations. Geographic, demographic, and institutional variations in disease presentation can lead to AI models that perform well in specific settings but fail when deployed in diverse clinical environments. Additionally, the lack of diversity in training datasets can perpetuate existing healthcare disparities and limit the global applicability of AI solutions. Moreover, the 'black box' nature of many AI algorithms raises concerns about transparency and explainability, making it difficult for pathologists to understand and trust AI-generated recommendations. These generalizability challenges can undermine confidence in AI systems and slow their clinical adoption.

Covid-19 Impact:

The COVID-19 pandemic accelerated the adoption of digital pathology and AI technologies as healthcare systems sought to maintain diagnostic services while minimizing physical contact. Remote work requirements necessitated the implementation of telepathology solutions, enabling pathologists to review cases from home and collaborate virtually with colleagues. Furthermore, the pandemic highlighted the critical shortage of pathologists and the need for automated diagnostic tools to handle increased workloads efficiently. The crisis also drove investments in cloud-based pathology platforms and AI-powered diagnostic systems to ensure continuity of care during lockdowns and social distancing measures.

The software segment is expected to be the largest during the forecast period

The software segment is expected to account for the largest market share during the forecast period due to the fundamental role of AI algorithms and analytical platforms in pathology automation. Software solutions encompass image analysis algorithms, machine learning models, and diagnostic decision support systems that form the core of AI-powered pathology workflows. The increasing demand for automated image interpretation, pattern recognition, and diagnostic assistance drives substantial investment in software development. Additionally, continuous algorithm improvements and the development of specialized applications for various pathological conditions contribute to the segment's dominant market position.

The cloud-based segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the cloud-based segment is predicted to witness the highest growth rate, driven by the need for scalable, accessible, and cost-effective AI pathology solutions. Cloud platforms enable healthcare institutions to access sophisticated AI algorithms without substantial upfront infrastructure investments, making advanced diagnostic tools available to smaller laboratories and resource-constrained settings. Furthermore, cloud-based systems facilitate seamless collaboration between pathologists, enable remote consultations, and support the sharing of large histopathological datasets required for AI model training. Additionally, cloud platforms support continuous algorithm updates and improvements, ensuring that users have access to the latest AI capabilities without manual software installations.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share owing to the region's advanced healthcare infrastructure, substantial research and development investments, and favorable regulatory environment for AI medical devices. The region benefits from strong government initiatives, including funding programs from organizations like ARPA-H that promote AI implementation in clinical diagnostics. Additionally, the presence of leading technology companies and established partnerships between healthcare providers and AI developers accelerate market growth. The high adoption rate of digital pathology systems and the availability of skilled professionals further strengthen North America's market position.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by increasing healthcare expenditure, expanding digital infrastructure, and rising awareness of AI applications in medical diagnostics. Countries like China, Japan, and India are investing heavily in healthcare modernization initiatives that include AI pathology solutions to address growing disease burdens and pathologist shortages. Furthermore, the region's large patient population provides extensive datasets for AI model training and validation, creating opportunities for localized algorithm development. Government support for digital health initiatives and favorable policies for AI adoption in healthcare accelerate market expansion.

Key players in the market

Some of the key players in AI in Pathology – Diagnostic Automation Market include PathAI, Inc., Paige.AI, Inc., Aiforia Technologies Plc, Akoya Biosciences, Inc., Deep

Bio, Inc., Ibx Medical Analytics Ltd., Proscia Inc., Indica Labs, Inc., Inspirata, Inc., Mindpeak GmbH, Tribun Health, OptraSCAN, Inc., aetherAI Co., Ltd., DoMore Diagnostics AS, Hologic, Inc., Roche Tissue Diagnostics, Google (Alphabet Inc.) and Microsoft.

Key Developments:

In June 2025, PathAI, a global leader in artificial intelligence (AI) and digital pathology solutions announced that it has received 510(k) clearance from the U.S. Food and Drug Administration (FDA) for AISight® Dx*—its digital pathology image management system—for use in primary diagnosis in clinical settings. Building on the initial 510(k) clearance for AISight Dx(Novo) in 2022, this latest milestone underscores the platform's continuous innovation and PathAI's commitment to delivering enhanced capabilities as the product evolves.

In March 2025, Aiforia Technologies, a pioneer in AI-driven diagnostics in pathology, has announced a new partnership with PathPresenter. This collaboration aims to broaden the reach and adoption of Aiforia's AI-powered image analysis solutions by utilizing PathPresenter's comprehensive pathology workflow platform. By combining their distinct expertise in digital pathology, the companies aim to provide pathologists with enhanced diagnostic capabilities and streamlined end-to-end workflow management solutions.

In March 2025, Proscia®, a software company leading pathology's transition to digital and AI, has secured \$50M in funding, bringing its total raised to \$130M. This investment follows Proscia's record-breaking growth in 2024. Proscia now counts 16 of the top 20 pharmaceutical companies among its users and is on track for 22,000+ patients to be diagnosed on its Concentriq® software platform each day.

Components Covered:

Software

Hardware

Services

Deployment Modes:

On-premise

Cloud-based

Hybrid

Technologies Covered:

Machine Learning (ML) & Deep Learning (DL)

Natural Language Processing (NLP)

Computer Vision

Other AI Technologies

Applications Covered:

Disease Diagnosis & Prognosis

Drug Discovery & Development

Clinical Workflow Optimization

Research & Academic Applications

End Users Covered:

Hospitals & Healthcare Institutions

Diagnostic Laboratories

Pharmaceutical & Biotechnology Companies

Academic & Research Institutes

Contract Research Organizations (CROs)

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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