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South & Central America Anatomic Pathology Market Report (2021-2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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Abstracts

The anatomic pathology market is projected to grow significantly, reaching an estimated US$ 1,661.29 million by 2031, up from US$ 1,072.82 million in 2023. This growth represents a compound annual growth rate (CAGR) of 5.6% from 2023 to 2031.

Executive Summary and Market Overview

In South and Central America, the anatomic pathology market is divided into key regions: Brazil, Argentina, and the Rest of South and Central America. The region benefits from well-established healthcare systems, increasing governmental support, and a rise in research and development activities, all of which create a conducive environment for market growth. Additionally, the rising incidence of strokes, neurological disorders, and various cancers, coupled with an aging population and unhealthy lifestyle choices, are significant factors driving the demand for anatomic pathology services and devices.

Market Segmentation Analysis

The South and Central America anatomic pathology market can be analyzed through several key segments: products and services, applications, and end users.

1. Products and Services: This segment is further divided into services, instruments, and consumables. In 2023, instruments accounted for the largest market share. The services category is subdivided into histopathology and cytopathology, while the instruments segment includes microtomes, cryostats, automatic stainers, tissue processors, and other related tools.

2. Applications: The market is segmented by application into disease diagnosis, drug discovery and development, and other uses. The disease diagnosis segment was the largest contributor to the market in 2023, reflecting the critical role of anatomic pathology in identifying and diagnosing diseases.

3. End Users: This segment includes hospitals, research laboratories, diagnostic laboratories, and others. Hospitals represented the largest share of the market in 2023, highlighting their central role in the delivery of anatomic pathology services.

Market Outlook

Companies operating in the anatomic pathology sector are increasingly pursuing various strategies to enhance their market presence and revenue. These strategies include geographic expansion, the introduction of new products, and technological advancements. Recent developments in the market illustrate this trend:

> In May 2024, Quest Diagnostics and PathAI announced a collaboration aimed at accelerating the integration of digital and AI pathology innovations to enhance the quality, speed, and efficiency of cancer and disease diagnoses. As part of this agreement, Quest will acquire certain assets from PathAI Diagnostics, which specializes in digital and anatomic pathology laboratory services.
>
> In April 2024, Medline became the distributor for Epredia, a member of the PHC Group, which offers solutions for precision cancer diagnostics and tissue diagnostics in the anatomic pathology field. This partnership allows Medline to expand its portfolio of laboratory products and devices.

These strategic initiatives by market players are expected to significantly contribute to the growth of the anatomic pathology market.

Country Insights

The South and Central America anatomic pathology market is primarily composed of Brazil, Argentina, and the Rest of the region, with Brazil holding the largest market share in 2023. Brazil, being the fifth largest country globally in terms of both area and population, is experiencing rapid demographic aging, which is one of the fastest in the world. This demographic shift is leading to an increase in chronic conditions such as cancer, orthopedic issues, neurovascular disorders, and diabetes, thereby driving the demand for medical devices and diagnostic tests.

The prevalence of cancer in Brazil is particularly concerning. For instance, cervical cancer cases are on the rise, with an estimated 16,710 new cases reported in 2020. The risk of developing this condition is approximately 15.38 per 100,000 women. Brazilian health guidelines recommend cytology tests every three years for women aged 25 to 64, provided they have had two consecutive negative annual results. The Unified Health System (SUS) in Brazil, one of the largest public health systems globally, is tasked with providing healthcare services across diverse populations and settings, creating a favorable environment for market growth.

In September 2021, Roche launched the Digital Pathology Open Environment to foster collaboration among software developers, aiming to improve patient outcomes and enhance personalized healthcare through innovative image analysis technologies. Furthermore, ongoing product launches and regulatory approvals are anticipated to further stimulate the growth of the anatomic pathology market in Brazil during the forecast period.

Company Profiles

Key players in the South and Central America anatomic pathology market include F. Hoffmann-La Roche Ltd, Beckman Coulter Inc, Hologic Inc, Diapath S.p.A., Bio SB, Merck KGaA, and PHC Holdings Corporation, among others. These companies are actively engaging in strategies such as market expansion, product innovation, and mergers and acquisitions to deliver cutting-edge products and increase their market share.

Reason to buy

Save and reduce time carrying out entry-level research by identifying the growth, size, leading players, and segments in the South & Central America anatomic pathology market.

Highlights key business priorities in order to assist companies to realign their business strategies.

The key findings and recommendations highlight crucial progressive industry trends in South & Central America anatomic pathology market, thereby allowing players across the value chain to develop effective long-term strategies.

Develop/modify business expansion plans by using substantial growth offering developed and emerging markets.

Scrutinize in-depth South & Central America market trends and outlook coupled with the factors driving the anatomic pathology market, as well as those hindering it.

Enhance the decision-making process by understanding the strategies that underpin security interest with respect to client products, segmentation, pricing, and distribution.

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