

AI-Assisted Pathology Software

ANMD-MRS12-119 · Digital Health & Clinical AI Technologies

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

AI-assisted pathology software analyses digitised tissue slides to detect cancer, quantify biomarkers and support diagnosis — the computational layer atop the shift from glass slides to digital pathology, spanning image analysis, cancer-detection AI, biomarker quantification and computational-pathology platforms. This decision-grade study sizes the global market three ways — value, deployments and slides analysed — across AI function, deployment and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

The sustainability case here is social and systemic. AI pathology can improve diagnostic access, consistency and precision-oncology care, while raising bias, validation and accountability questions.

Mapped Sustainable Development Goals:

SDG 3 Good Health & Well-Being	SDG 9 Industry, Innovation & Infrastructure	SDG 10 Reduced Inequalities	SDG 12 Responsible Consumption	SDG 17 Partnerships for the Goals
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Measurable sustainability outcomes assessed:

- Faster, more consistent diagnosis
- Quantified, reproducible biomarkers
- Extended pathologist reach
- Algorithmic bias, validation safety and accountability as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	20+ Companies Profiled	5 SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America leads clinical adoption; Europe scales on digitisation; Asia Pacific grows fastest; other regions assessed on their own merits.

MARKET OVERVIEW

From research to regulated diagnosis — where biomarker quantification drives the highest-value use cases.

AI pathology is moving from research to regulated clinical diagnosis, riding the wave of digital-pathology adoption. Demand is driven by pathologist shortages, precision-oncology biomarker needs and digitisation across North America, Europe and Asia Pacific. The market is read three ways — value, deployments and slides analysed — and forecast under four scenarios, each region reported separately.

- **North America leads clinical adoption** — United States, on digital-pathology rollouts, FDA clearances and precision-oncology biomarker demand
- **Europe scales on digitisation** — the UK, Germany and the Netherlands, where digital-pathology programmes and CE-MDR drive uptake
- **Asia Pacific grows fastest** — China, Japan and South Korea, combining high cancer caseloads with AI investment
- **Biomarker quantification is the differentiator** — precision-oncology demand for reproducible, quantified biomarkers drives the highest-value use cases

REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Adoption leader	United States, Canada — reimbursement, FDA pathway, enterprise EHR scale
Europe	Digitisation-driven	Germany, France, UK, Netherlands — EU MDR/AI Act, national health systems
Asia Pacific	Fastest growth	China, Japan, India, South Korea, Australia — digital-health investment
Middle East	Strategy-led	Saudi Arabia, UAE, Israel — digital-health strategy, sovereign investment
Latin America	Emerging	Brazil, Chile, Mexico — telehealth growth, access gaps
Africa	Frontier	South Africa, Egypt, Kenya — access expansion, mobile health, blended finance

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • Pathologist shortages & rising caseloads • Digital-pathology adoption & scanning • Precision-oncology biomarker demand • Diagnostic consistency & reproducibility • FDA / CE clearances & validation 	<ul style="list-style-type: none"> • Digital-pathology infrastructure cost • Validation & regulatory burden • Pathologist trust & workflow change • Scanner / storage & integration needs • Reimbursement & ROI uncertainty

SEGMENTATION SNAPSHOT

By AI Function	Cancer-detection AI · biomarker-quantification AI · image analysis · workflow & slide-management · computational-pathology platforms
By Deployment	Cloud · on-premise · LIS / scanner-integrated
By Application	Hospitals · clinics & outpatient · home / community
By End User	Hospitals · health systems · payers · clinicians · patients
By Scale	Departmental · enterprise · health-system / national
By Business Model	SaaS subscription · per-use · managed services

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- > Chapter 1. Scope, Methodology and Report Architecture
- > Chapter 2. Industry Discovery Summary — AI-Assisted Pathology Software
- > Chapter 3. Executive Intelligence and Decision Dashboard
- > Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- > Chapter 5. Industry Overview and Market Evolution
- > Chapter 6. Market Dynamics
- > Chapter 7. Global Market Size and Forecast, 2020–2032
- > Chapter 8. Market Segmentation Analysis
- > Chapter 9. End-User and Demand-Side Intelligence
- > Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- > Chapter 11. Global Regional Intelligence Framework
- > Chapter 12. North America Market Intelligence
- > Chapter 13. Europe Market Intelligence
- > Chapter 14. Asia Pacific Market Intelligence
- > Chapter 15. Latin America Market Intelligence
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- > Chapter 17. Middle East Market Intelligence
- > Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- > Chapter 19. Technology Landscape and Architecture
- > Chapter 20. Emerging and Next-Generation Technology Intelligence
- > Chapter 21. Category-Specific Intelligence Module
- > Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
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- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans computational-pathology specialists, diagnostics and tissue-staining majors, and digital-pathology platform players. Deal activity — FDA clearances, pharma biomarker partnerships and digital-pathology integration — signals a market consolidating around regulated, precision-oncology diagnosis.

Representative players profiled in the full report:

Paige.AI, Inc. · PathAI, Inc. · Ibex Medical Analytics Ltd. · Roche Holding AG (Ventana) · Koninklijke Philips N.V. · and further profiled players across computational-pathology specialists and majors.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- How large is the global AI pathology market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- How does biomarker quantification change value versus detection-only AI?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs, diagnostic access and responsible-AI governance?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability view in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume and the physical-unit views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

WHO SHOULD BUY THIS REPORT

Investors, OEMs, health systems, payers, clinicians, lenders and policymakers, and strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.