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Vendor Neutral Archive Market & PACS Market - VNA [On-premise Software, Hybrid & Cloud, Multi-Department & Multi-Site VNA] & Picture Archiving and Communication System [Enterprise, Cardiology & Radiology] - Global Forecast to 2018

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Abstracts

Vendor neutral archives (VNAs) are information technology platforms that allow single, long-term, centralized, and standard-based storage of medical imaging studies and other patient data from multiple vendor PACS. Picture Archiving and Communication System, on the other hand, function as tools that directly connect to different imaging modalities in a facility by acquiring images from them. The global market is estimated to be valued at $165.3 million in 2013 and is expected to reach $335.4 million by 2018, at a healthy CAGR of 15.2%.

The Picture Archiving and Communication System market is broadly categorized into departmental PACS and enterprise PACS. Departmental PACS dominates the revenue market with a market share of around 90.8% in 2013. The departmental PACS market is segmented into radiology, cardiology, and other departmental PACS. Radiology PACS accounts for the largest share—63%—of the departmental PACS market owing to the increasing volumes of diagnostic images in this department.

The vendor neutral archives market is classified on the basis of delivery mode (the form of the product offering), procurement model (deployment options chosen by customers), and VNA suppliers. In this market by delivery mode, on-premise VNA solutions are the largest segment of the market owing to the better data security and control that they offer, as perceived by hospitals. This segment is valued at $140.3 million in 2013. Hybrid vendor neutral archives solutions are expected to grow at the highest CAGR during the forecast period. By procurement model, multi-departmental VNAs have the highest adoption rate globally in 2013 and contribute around 41% to the overall market.

The driving forces for this market include the rising demand for non-DICOM content management, disaster recovery, and lifecycle management solutions. New opportunities for the market lie in development of VNAs through implementation of a patient-centric approach. However, factors such as long vendor neutral archives lifecycles and misinterpretation of the VNA concept restrain the market. Keeping pace with the evolving standards for medical images and image enablement of EHRs (Electronic Health Records) are the challenges faced by the market.

North America holds the largest share of the global market in 2013. The large share is attributed to Meaningful Use, a staged program for adoption of healthcare information systems that is a part of the HITECH Act (Healthcare Information Technology for Economical and Clinical Health Act) in the U.S., and the enterprise and state-wide installation of VNAs in Canada. Europe will witness strong growth due to the public-based healthcare system in most European countries that allows high-priced and large scale VNA contracts. The European market is poised to grow at a CAGR of 16.6% to reach $44.8 million by 2018. Australia, Brazil, China, India, and Japan and are the major contributors amongst all emerging countries in 2013.

The market is highly consolidated with key players being Acuo Technologies (U.S.), Agfa Healthcare (Belgium), Carestream Health (U.S.), Dell, Inc. (U.S.), GE Healthcare (U.K.), Merge Health (U.S.), and TeraMedica (U.S.).

Scope of the Report

This research report categorizes and analyzes the market on the basis of delivery mode, procurement model and supplier type. These markets are further divided into segments and sub-segments, to provide exhaustive value analysis for the years 2011, 2012, 2013, and forecast to 2018. Each market is comprehensively analyzed at a regional level (North America, Europe, Asia-Pacific and RoW) to provide in-depth information on the global market scenario.

Global Vendor Neutral Archives Market

Delivery Mode

On-Premise/Onsite VNA

Hybrid VNA

Fully Cloud-hosted VNA

Procurement Model

Departmental VNA

Multi-department Enterprise VNA

Multi-site Enterprise VNA

Market Players

Picture Archiving and Communication System Vendors

Independent Software Vendors

Infrastructure Vendors

Geography

North America

Europe

Asia-Pacific

RoW

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About

By bringing desired changes in the clinical workflow and by improving the unification and accessibility of data, VNAs have the capability to provide enhanced patient care. VNAs provide timely access to patient data at the point-of-care. They also offer early access to professional help for patients, they help with faster decision making, and they bring about transparency. Another factor that is driving the need for patient-centric systems is rising patient awareness. The increased awareness of patients with regards to healthcare has greatly helped them to make decisions, especially in the management and treatment of chronic conditions. If the patient has access to his/her personal health information that is shared across public and private clinical organizations, it could enable healthcare providers and patients to collaborate and make informed decisions.

Many EHR systems that are marketed today are featured as "patient portals" that give individuals immediate access to their own lab results, X-ray reports, list of medications, and other information. Similar strategies can be applied to VNAs that would allow patients to communicate securely via e-mail with their physicians and other medical personnel. Thus, installation of VNAs that are developed with the idea of delivering high-quality patient care is poised to increase amongst organizations.

The multi-department VNA segment accounts for the largest share—XX%—of the global VNA market in 2013. This segment is expected to reach $XX million by 2018 at a CAGR of XX% for the same period. Cross-departmental interoperability is seen as the first step to achieving communication within a hospital setting, a factor that explains the largest share and highest CAGR of this segment. The segment is closely followed by departmental VNAs contributing XX% to the market. This procurement model is generally adopted in radiology departments with the view to test a VNA for their department so as to take a further decision of scaling up to a multi-departmental level. A VNA at a multi-site level allows VNA adoption across various hospital enterprises, the trend for which is growing at a rapid pace.

North America commands the largest share—XX%—of the global VNA market at an estimated $XX million in 2013. It is expected to reach $XX million by 2018, at a CAGR of XX% from 2013 to 2018. This growth in the North American market is because of the mandates imposed by the federal government for image enablement of EHRs via Meaningful Use of the HITECH (Healthcare Information Technology for Economical and Clinical Health) Act. The rising imaging volume in the U.S.—owing to the aging population and subsequent demand for diagnostic imaging—is another major reason for its large share.

Europe, on the other hand, has the second-highest share in the VNA market and is the fastest growing region for VNA adoption. The healthcare structure in European countries like U.K., Germany, and France encourages VNA deployment on a multi-site level rather than on a departmental level. Deployment of VNAs on a large scale is expected to bring higher revenues to the European market, thus substantiating the higher growth. Moreover, the European market is more advanced than the U.S. market in terms of standards followed. The European market has begun to adopt the XDS-based VNA while the U.S. market, on the other hand, still lags behind technologically, with the traditional DICOM standard-based VNA still accounting for the largest share in the U.S.

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