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Vendor-Neutral Archive (VNA) and PACS Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Imaging Modality (Angiography, Mammography, Computed Tomography, Magnetic Resonance Imaging, Ultrasound, Others), By Type (PACS, VNA Software), By Mode of Delivery (On-Site, Hybrid, Cloud-hosted), By Usage Model (Single Department, Multiple Departments, Multiple Sites), By Region, Competition, Forecast & Opportunities, 2019-2029F

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Abstracts

Global Vendor-Neutral Archive (VNA) and PACS Market was valued at USD 3.55 billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.07% through 2029. The Global Vendor-Neutral Archive (VNA) and Picture Archiving and Communication System (PACS) Market is a dynamic and rapidly evolving sector within the healthcare industry. VNA and PACS are critical components of medical imaging and data management, facilitating the storage, retrieval, and distribution of medical images and patient information.

Key Market Drivers

Digitalization of Medical Imaging

The digitalization of medical imaging has brought about a seismic shift in healthcare, revolutionizing the way medical images are acquired, stored, and shared. This

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transformation has not only improved patient care but has also significantly contributed to the rapid growth of the Global Vendor-Neutral Archive (VNA) and Picture Archiving and Communication System (PACS) market. Traditionally, medical images were captured on X-ray films and stored in physical archives, which presented several challenges. The digitalization of medical imaging has eliminated the need for film, enabling healthcare providers to capture, store, and share images in electronic formats. This shift has not only improved image quality but also made it easier to manage and retrieve patient data. Digital images can be easily stored, retrieved, and managed within electronic systems. PACS solutions provide healthcare facilities with centralized digital repositories for medical images, while VNAs extend this capability to include other patient data types. This efficient data management streamlines workflows, reduces administrative overhead, and ultimately enhances patient care. Digitalization facilitates interoperability between different medical imaging devices and systems. PACS and VNA solutions are designed to integrate seamlessly with various imaging equipment from different vendors. This interoperability ensures that medical images can be accessed and shared across the healthcare ecosystem, regardless of the source. Digital medical images can be accessed remotely, allowing healthcare professionals to review patient data from anywhere with an internet connection. This capability has become particularly valuable in telemedicine and remote consultations, where specialists can provide expertise without physical presence. PACS and VNA systems enable secure remote access to these vital images and records.

Interoperability and Integration

In the dynamic landscape of healthcare, seamless access to patient data and medical images has become imperative. This need has given rise to the Global Vendor-Neutral Archive (VNA) and Picture Archiving and Communication System (PACS) market, which is experiencing substantial growth due to the twin pillars of interoperability and integration. Interoperability in healthcare refers to the ability of different systems, devices, and applications to communicate and exchange data seamlessly. In the context of VNA and PACS, interoperability allows various healthcare systems to work together harmoniously, regardless of the vendor or format of the data. This is crucial because healthcare organizations typically operate a multitude of imaging equipment from different manufacturers. Interoperable VNAs and PACS bridge these gaps, fostering efficient data exchange. Integration goes hand in hand with interoperability. While interoperability ensures that different systems can communicate, integration ensures that they can work together seamlessly. PACS and VNA solutions that are integrated into a healthcare facility's existing systems, such as Electronic Health Records (EHRs) and Radiology Information Systems (RIS), streamline workflows by

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providing a unified platform for accessing and managing patient data. This integration enhances operational efficiency and reduces administrative burden. Interoperable and integrated VNA and PACS solutions reduce data redundancy. Instead of storing the same patient data or images in multiple locations, these systems enable centralized storage. This not only saves storage space but also minimizes the chances of data inconsistencies and errors, which can be critical in healthcare decision-making. Interoperable systems ensure that patient data is available when and where it's needed. For clinicians and radiologists, this means quicker access to critical medical images and patient histories. Timely access to comprehensive patient information leads to faster and more accurate diagnoses and treatment decisions, ultimately enhancing patient care.

Cloud-Based Solutions

The healthcare industry is undergoing a profound transformation, and at the heart of this change is the rapid adoption of cloud-based solutions. Within this evolving landscape, the Global Vendor-Neutral Archive (VNA) and Picture Archiving and Communication System (PACS) market have emerged as key beneficiaries of the cloud revolution. Cloud-based VNA and PACS solutions offer unparalleled scalability and flexibility. Traditional on-premises systems often require significant capital investments to expand storage capacity and capabilities. In contrast, cloud solutions allow healthcare providers to scale up or down as needed, paying only for the resources they use. This flexibility ensures that VNA and PACS systems can adapt to the evolving needs of healthcare organizations of all sizes. The cost advantages of cloud-based solutions are a significant driver of their adoption in healthcare. Cloud-based VNA and PACS eliminate the need for extensive on-site hardware infrastructure, reducing upfront capital expenditure and ongoing maintenance costs. Smaller healthcare facilities, in particular, benefit from the cost-efficiency of cloud solutions, making advanced imaging technology accessible to a broader range of providers. Cloud-based VNA and PACS systems provide easy and secure access to medical images and patient data from anywhere with an internet connection. This accessibility is vital for remote collaboration among healthcare professionals, particularly in telemedicine and multidisciplinary care settings. Cloud solutions empower radiologists, clinicians, and specialists to review and discuss patient cases, leading to more comprehensive and timely diagnoses. Cloud infrastructure offers robust disaster recovery capabilities and data redundancy. Cloud providers typically replicate data across multiple geographically dispersed data centers. This redundancy ensures that patient data remains accessible even in the face of unforeseen events such as natural disasters or system failures, enhancing data security and continuity of care.

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Remote Access and Telemedicine

The global healthcare landscape is experiencing a profound transformation, with remote access and telemedicine emerging as powerful tools to improve patient care and streamline medical services. This paradigm shift has ignited substantial growth in the Global Vendor-Neutral Archive (VNA) and Picture Archiving and Communication System (PACS) market. Telemedicine has witnessed a meteoric rise in recent years, and the COVID-19 pandemic only accelerated this trend. The ability to remotely consult with healthcare providers, whether for routine check-ups, specialist consultations, or follow-up appointments, has become essential. Telemedicine relies heavily on access to medical records and images, and this is where VNAs and PACS systems come into play. Remote access to patient data and medical images is a cornerstone of effective telemedicine. PACS and VNA solutions enable healthcare professionals to securely access a patient's complete medical history, including diagnostic images, from anywhere with an internet connection. This ensures that telehealth consultations are as informative and thorough as in-person visits. When telemedicine consultations involve medical imaging, it's vital that physicians and specialists can access high-quality images quickly. PACS systems provide rapid image retrieval, enabling real-time assessment and diagnosis during telehealth appointments. This streamlines diagnostic workflows and ensures that patients receive prompt and accurate care. Telemedicine often involves collaborative care between different specialists and healthcare providers. VNA and PACS solutions facilitate this collaboration by enabling remote access to patient records and images, making it easier for multiple stakeholders to contribute to the diagnosis and treatment planning process.

Key Market Challenges

Interoperability Issues

One of the most significant challenges in the VNA and PACS market is achieving seamless interoperability among various healthcare systems and devices. While the concept of VNA is vendor-neutral and designed to break down data silos, achieving true interoperability remains complex. Different equipment from various manufacturers may use proprietary formats and protocols, making integration a challenging task.

Data Migration Complexity

Healthcare organizations often face the daunting task of migrating legacy data to VNA

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and PACS systems. This process can be time-consuming, resource-intensive, and prone to errors, especially when dealing with extensive historical archives of medical images and patient records. Ensuring data integrity and completeness during migration is a significant challenge.

Data Security and Privacy Concerns

With the increasing prevalence of data breaches and cyberattacks in healthcare, data security and patient privacy have become paramount concerns. VNA and PACS systems must adhere to stringent security standards and regulatory requirements like HIPAA and GDPR. Ensuring the confidentiality and integrity of sensitive patient data is an ongoing challenge.

Scalability and Performance

As healthcare organizations grow and the volume of medical imaging data increases, scalability and performance become critical. VNA and PACS solutions must handle the growing demands for storage and retrieval without sacrificing speed or data integrity. Scaling up these systems while maintaining optimal performance can be challenging.

Key Market Trends

Interoperability and Data Standardization

Interoperability and data standardization are key drivers propelling the growth of the Vendor Neutral Archive (VNA) and Picture Archiving and Communication System (PACS) market. Healthcare systems generate vast volumes of medical imaging data, necessitating efficient management and exchange protocols. VNA and PACS systems supporting standardized formats and protocols enable seamless integration with other healthcare IT systems like electronic health records (EHRs) and radiology information systems (RIS). By adhering to industry standards such as DICOM (Digital Imaging and Communications in Medicine) and HL7 (Health Level Seven), these systems facilitate the exchange of medical images and associated patient information across diverse healthcare settings. Enhanced interoperability and data standardization promote streamlined workflows, diminish errors, and foster improved continuity of care.

Cloud-Based Deployment and Data Exchange

The adoption of cloud-based Vendor Neutral Archive (VNA) and Picture Archiving and

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Communication System (PACS) solutions is poised to drive significant market growth. Cloud-based deployment offers numerous benefits, including scalability, accessibility, cost-effectiveness, and robust data security measures. By leveraging cloud-based VNA and PACS systems, healthcare providers can securely store, manage, and exchange medical images and associated data over the internet. This facilitates seamless collaboration and data sharing among healthcare professionals, irrespective of their geographic location. Additionally, cloud-based solutions eliminate the need for extensive on-premises infrastructure, resulting in reduced upfront costs and simplified maintenance efforts. The transition to cloud-based VNA and PACS systems empowers healthcare organizations to streamline their operations, enhance data accessibility, and elevate the quality of patient care delivery.

Integration of Artificial Intelligence (AI) and Machine Learning

The growth of the global Vendor-Neutral Archive (VNA) and Picture Archiving and Communication System (PACS) market is propelled by the integration of artificial intelligence (AI) and machine learning technologies. These technologies have the potential to transform medical imaging by boosting diagnostic accuracy, streamlining workflow efficiency, and enabling predictive analytics. VNA and PACS systems incorporating AI capabilities can automatically analyze and interpret medical images, aid in anomaly detection, offer decision support to radiologists, and facilitate automated image classification and annotation. The integration of AI and machine learning in VNA and PACS systems presents significant opportunities for cost reduction, improved patient outcomes, and heightened overall efficiency in healthcare operations.

Segmental Insights

Mode of Delivery Insights

Based on the category of Mode of Delivery, the On-Site segment is expected to register the fastest growth during the forecast period. The conventional approach to software implementation is the on-site model, which is favored by healthcare facilities and hospitals for storing and managing patient data. When healthcare providers need to transition to new technology or make changes to their existing systems, they typically opt for on-premises data storage. This is particularly true for those who are relatively new to VNA and PACS technologies, either as end-users or service providers. Consequently, the on-site mode of delivery is expected to occupy a significant portion of the market's revenue share due to its increasing adoption worldwide. The continuous efforts of major players, including innovation and product launches, contribute to the

growth of this segment. For example, in February 2022, ScImage, Inc., a leading provider of cloud-centric enterprise imaging solutions, introduced its PICOM365 enterprise imaging workflow, which offers the full functionality of on-premises PACS software while utilizing the Microsoft Azure Cloud platform. Therefore, considering these factors, the segment is anticipated to experience growth throughout the forecast period.

Usage Model Insights

The Multiple Sites segment is poised to dominate the global Vendor-Neutral Archive (VNA) and Picture Archiving and Communication System (PACS) market due to several compelling reasons. Healthcare organizations, especially larger hospital networks and multi-facility healthcare systems, are increasingly recognizing the value of centralizing their medical imaging and patient data across multiple sites. This approach streamlines data management, enhances data accessibility for healthcare professionals at different locations, and promotes efficient collaboration among specialists and care teams. Moreover, it offers cost savings through centralized data storage and reduced administrative overhead. As healthcare providers seek to improve patient care, optimize resources, and ensure consistent data access across their network, the Multiple Sites segment is poised to grow and dominate the VNA and PACS market, meeting the complex data management needs of modern healthcare ecosystems.

Regional Insights

The North America market for Vendor-Neutral Archive (VNA) and Picture Archiving and Communication System (PACS) is poised for substantial growth, driven by several factors. These include the rising demand for universalizing medical image archiving, cost reductions in data storage, and the compatibility of VNA with older archival systems. Furthermore, the region benefits from a well-established healthcare IT infrastructure, the presence of major industry players, and proactive initiatives undertaken by market participants in the United States, all of which contribute to the market's expansion.

The introduction of new products by key market players is another significant driver of growth in the United States. For instance, in November 2022, RamSoft launched Omega AI VNA, a vendor-neutral archive designed to facilitate seamless image and data exchange within healthcare enterprises. Omega AI VNA consolidates information from diverse systems, providing clinicians with a comprehensive view of a patient's medical history. This product represents a notable addition to RamSoft's enterprise imaging platform.

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VNA and PACS market in Canada and Mexico is also expected to witness growth during the forecast period. These countries are experiencing increasing demand for product launches and partnerships among market players and service providers, propelling market expansion. For instance, in January 2022, a Mexican platform advanced digital diagnostic in Latin America through Eva, enabling remote test analysis and expanding healthcare access beyond major urban centers. This platform streamlines the diagnostic process, offering cost-effective and digitized alternatives to traditional imaging plates.

Also, in April 2022, Sectra signed a contract with North York General Hospital (NYGH) in Canada. NYGH will leverage Sectra's enterprise imaging solution, incorporating radiology and breast imaging modules along with a vendor-neutral archive (VNA). This implementation aims to enhance radiology reading efficiency, improve workflow, and ultimately elevate patient care without overburdening staff.These advancements in North America, including the United States, Canada, and Mexico, are poised to propel the growth of the VNA and PACS market in the region. Consequently, considering these factors, the market is expected to flourish in North America.

Key Market Players

Agfa HealthCare NV

Dell Technologies Inc

FUJIFILM Holdings Corp

GE Healthcare Inc

International Business Machines Corp

Koninklijke Philips NV

Lexmark International Inc

McKesson Corp

Novarad Corp

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Siemens Healthineers AG

Report Scope:

In this report, the Global Vendor-Neutral Archive (VNA) and PACS Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Vendor-Neutral Archive (VNA) and PACS Market,By Imaging Modality:

oAngiography

oMammography

oComputed Tomography

oMagnetic Resonance Imaging

oUltrasound

oOthers

Vendor-Neutral Archive (VNA) and PACS Market,By Type:

oPACS

oVNA Software

Vendor-Neutral Archive (VNA) and PACS Market,By Mode of Delivery:

oOn-Site

oHybrid

oCloud-hosted

Vendor-Neutral Archive (VNA) and PACS Market,By Usage Model:

oSingle Department

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oMultiple Departments

oMultiple Sites

Vendor-Neutral Archive (VNA) and PACS Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

Germany

United Kingdom

France

Italy

Spain

oAsia-Pacific

China

Japan

India

Australia

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South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Vendor-Neutral Archive (VNA) and PACS Market.

Available Customizations:

Global Vendor-Neutral Archive (VNA) and PACS marketreport with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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Contents

1.PRODUCT OVERVIEW

1.1.Market Definition
1.2.Scope of the Market
  1.2.1.Markets Covered
  1.2.2.Years Considered for Study
  1.2.3.Key Market Segmentations

2.RESEARCH METHODOLOGY

2.1.Objective of the Study
2.2.Baseline Methodology
2.3.Key Industry Partners
2.4.Major Association and Secondary Sources
2.5.Forecasting Methodology
2.6.Data Triangulation Validation
2.7.Assumptions and Limitations

3.EXECUTIVE SUMMARY

3.1.Overview of the Market
3.2.Overview of Key Market Segmentations
3.3.Overview of Key Market Players
3.4.Overview of Key Regions/Countries
3.5.Overview of Market Drivers, Challenges, Trends

4.VOICE OF CUSTOMER

5.GLOBAL VENDOR-NEUTRAL ARCHIVE (VNA) AND PACS MARKET OUTLOOK

5.1.Market Size Forecast
  5.1.1.By Value
5.2.Market Share Forecast
  5.2.1.ByImaging Modality (Angiography, Mammography, Computed Tomography, Magnetic Resonance Imaging,Ultrasound, Others)
  5.2.2.By Type (PACS, VNA Software)
  5.2.3.By Mode of Delivery (On-Site, Hybrid, Cloud-hosted)

+44 20 8123 2220
info@marketpublishers.com

5.2.4.By Usage Model (Single Department, Multiple Departments, Multiple Sites)
5.2.5.By Region
5.2.6.By Company (2023)
5.3.Market Map
5.3.1.By Imaging Modality
5.3.2.By Type
5.3.3.By Mode of Delivery
5.3.4.By Usage Model
5.3.5.By Region

6.NORTH AMERICA VENDOR-NEUTRAL ARCHIVE (VNA) AND PACS MARKET OUTLOOK

6.1.Market Size Forecast
6.1.1.By Value
6.2.Market Share Forecast
6.2.1.By Imaging Modality (Angiography, Mammography, Computed Tomography, Magnetic Resonance Imaging, Ultrasound, Others)
6.2.2.By Type (PACS, VNA Software)
6.2.3.By Mode of Delivery (On-Site, Hybrid, Cloud-hosted)
6.2.4.By Usage Model (Single Department, Multiple Departments, Multiple Sites)
6.2.5.By Country
6.3.North America: Country Analysis
6.3.1.United States Vendor-Neutral Archive (VNA) and PACS Market Outlook
6.3.1.1.Market Size Forecast
6.3.1.1.1.By Value
6.3.1.2.Market Share Forecast
6.3.1.2.1.By Imaging Modality
6.3.1.2.2.By Type
6.3.1.2.3.By Mode of Delivery
6.3.1.2.4.By Usage Model
6.3.2.Canada Vendor-Neutral Archive (VNA) and PACS Market Outlook
6.3.2.1.Market Size Forecast
6.3.2.1.1.By Value
6.3.2.2.Market Share Forecast
6.3.2.2.1.By Imaging Modality
6.3.2.2.2.By Type
6.3.2.2.3.By Mode of Delivery
6.3.2.2.4.By Usage Model

+44 20 8123 2220
info@marketpublishers.com

6.3.3.Mexico Vendor-Neutral Archive (VNA) and PACS Market Outlook
6.3.3.1.Market Size Forecast
6.3.3.1.1.By Value
6.3.3.2.Market Share Forecast
6.3.3.2.1.By Imaging Modality
6.3.3.2.2.By Type
6.3.3.2.3.By Mode of Delivery
6.3.3.2.4.By Usage Model

7.EUROPE VENDOR-NEUTRAL ARCHIVE (VNA) AND PACS MARKET OUTLOOK

7.1.Market Size Forecast
7.1.1.By Value
7.2.Market Share Forecast
7.2.1.By Imaging Modality (Angiography, Mammography, Computed Tomography, Magnetic Resonance Imaging, Ultrasound, Others)
7.2.2.By Type (PACS, VNA Software)
7.2.3.By Mode of Delivery (On-Site, Hybrid, Cloud-hosted)
7.2.4.By Usage Model (Single Department, Multiple Departments, Multiple Sites)
7.2.5.By Country
7.3.Europe: Country Analysis
7.3.1.Germany Vendor-Neutral Archive (VNA) and PACS Market Outlook
7.3.1.1.Market Size Forecast
7.3.1.1.1.By Value
7.3.1.2.Market Share Forecast
7.3.1.2.1.By Imaging Modality
7.3.1.2.2.By Type
7.3.1.2.3.By Mode of Delivery
7.3.1.2.4.By Usage Model
7.3.2.United Kingdom Vendor-Neutral Archive (VNA) and PACS Market Outlook
7.3.2.1.Market Size Forecast
7.3.2.1.1.By Value
7.3.2.2.Market Share Forecast
7.3.2.2.1.By Imaging Modality
7.3.2.2.2.By Type
7.3.2.2.3.By Mode of Delivery
7.3.2.2.4.By Usage Model
7.3.3.France Vendor-Neutral Archive (VNA) and PACS Market Outlook
7.3.3.1.Market Size Forecast

+44 20 8123 2220
info@marketpublishers.com

7.3.3.1.1.By Value
7.3.3.2.Market Share Forecast
7.3.3.2.1.By Imaging Modality
7.3.3.2.2.By Type
7.3.3.2.3.By Mode of Delivery
7.3.3.2.4.By Usage Model
7.3.4.Italy Vendor-Neutral Archive (VNA) and PACS Market Outlook
7.3.4.1.Market Size Forecast
7.3.4.1.1.By Value
7.3.4.2.Market Share Forecast
7.3.4.2.1.By Imaging Modality
7.3.4.2.2.By Type
7.3.4.2.3.By Mode of Delivery
7.3.4.2.4.By Usage Model
7.3.5.Spain Vendor-Neutral Archive (VNA) and PACS Market Outlook
7.3.5.1.Market Size Forecast
7.3.5.1.1.By Value
7.3.5.2.Market Share Forecast
7.3.5.2.1.By Imaging Modality
7.3.5.2.2.By Type
7.3.5.2.3.By Mode of Delivery
7.3.5.2.4.By Usage Model

8.ASIA-PACIFIC VENDOR-NEUTRAL ARCHIVE (VNA) AND PACS MARKET OUTLOOK

8.1.Market Size Forecast
8.1.1.By Value
8.2.Market Share Forecast
8.2.1.By Imaging Modality (Angiography, Mammography, Computed Tomography, Magnetic Resonance Imaging, Ultrasound, Others)
8.2.2.By Type (PACS, VNA Software)
8.2.3.By Mode of Delivery (On-Site, Hybrid, Cloud-hosted)
8.2.4.By Usage Model (Single Department, Multiple Departments, Multiple Sites)
8.2.5.By Country
8.3.Asia-Pacific: Country Analysis
8.3.1.China Vendor-Neutral Archive (VNA) and PACS Market Outlook
8.3.1.1.Market Size Forecast
8.3.1.1.1.By Value

+44 20 8123 2220
info@marketpublishers.com

8.3.1.2.Market Share Forecast
8.3.1.2.1.By Imaging Modality
8.3.1.2.2.By Type
8.3.1.2.3.By Mode of Delivery
8.3.1.2.4.By Usage Model
8.3.2.Japan Vendor-Neutral Archive (VNA) and PACS Market Outlook
8.3.2.1.Market Size Forecast
8.3.2.1.1.By Value
8.3.2.2.Market Share Forecast
8.3.2.2.1.By Imaging Modality
8.3.2.2.2.By Type
8.3.2.2.3.By Mode of Delivery
8.3.2.2.4.By Usage Model
8.3.3.India Vendor-Neutral Archive (VNA) and PACS Market Outlook
8.3.3.1.Market Size Forecast
8.3.3.1.1.By Value
8.3.3.2.Market Share Forecast
8.3.3.2.1.By Imaging Modality
8.3.3.2.2.By Type
8.3.3.2.3.By Mode of Delivery
8.3.3.2.4.By Usage Model
8.3.4.Australia Vendor-Neutral Archive (VNA) and PACS Market Outlook
8.3.4.1.Market Size Forecast
8.3.4.1.1.By Value
8.3.4.2.Market Share Forecast
8.3.4.2.1.By Imaging Modality
8.3.4.2.2.By Type
8.3.4.2.3.By Mode of Delivery
8.3.4.2.4.By Usage Model
8.3.5.South Korea Vendor-Neutral Archive (VNA) and PACS Market Outlook
8.3.5.1.Market Size Forecast
8.3.5.1.1.By Value
8.3.5.2.Market Share Forecast
8.3.5.2.1.By Imaging Modality
8.3.5.2.2.By Type
8.3.5.2.3.By Mode of Delivery
8.3.5.2.4.By Usage Model

9.SOUTH AMERICA VENDOR-NEUTRAL ARCHIVE (VNA) AND PACS MARKET

+44 20 8123 2220
info@marketpublishers.com

OUTLOOK

9.1.Market Size Forecast
9.1.1.By Value
9.2.Market Share Forecast
9.2.1.By Imaging Modality (Angiography, Mammography, Computed Tomography, Magnetic Resonance Imaging, Ultrasound, Others)
9.2.2.By Type (PACS, VNA Software)
9.2.3.By Mode of Delivery (On-Site, Hybrid, Cloud-hosted)
9.2.4.By Usage Model (Single Department, Multiple Departments, Multiple Sites)
9.2.5.By Country
9.3.South America: Country Analysis
9.3.1.Brazil Vendor-Neutral Archive (VNA) and PACS Market Outlook
9.3.1.1.Market Size Forecast
9.3.1.1.1.By Value
9.3.1.2.Market Share Forecast
9.3.1.2.1.By Imaging Modality
9.3.1.2.2.By Type
9.3.1.2.3.By Mode of Delivery
9.3.1.2.4.By Usage Model
9.3.2.Argentina Vendor-Neutral Archive (VNA) and PACS Market Outlook
9.3.2.1.Market Size Forecast
9.3.2.1.1.By Value
9.3.2.2.Market Share Forecast
9.3.2.2.1.By Imaging Modality
9.3.2.2.2.By Type
9.3.2.2.3.By Mode of Delivery
9.3.2.2.4.By Usage Model
9.3.3.Colombia Vendor-Neutral Archive (VNA) and PACS Market Outlook
9.3.3.1.Market Size Forecast
9.3.3.1.1.By Value
9.3.3.2.Market Share Forecast
9.3.3.2.1.By Imaging Modality
9.3.3.2.2.By Type
9.3.3.2.3.By Mode of Delivery
9.3.3.2.4.By Usage Model

10.MIDDLE EAST AND AFRICA VENDOR-NEUTRAL ARCHIVE (VNA) AND PACS MARKET OUTLOOK

+44 20 8123 2220
info@marketpublishers.com

10.1.Market Size Forecast
10.1.1.By Value
10.2.Market Share Forecast
10.2.1.By Imaging Modality (Angiography, Mammography, Computed Tomography, Magnetic Resonance Imaging, Ultrasound, Others)
10.2.2.By Type (PACS, VNA Software)
10.2.3.By Mode of Delivery (On-Site, Hybrid, Cloud-hosted)
10.2.4.By Usage Model (Single Department, Multiple Departments, Multiple Sites)
10.2.5.By Country
10.3.MEA: Country Analysis
10.3.1.South Africa Vendor-Neutral Archive (VNA) and PACS Market Outlook
10.3.1.1.Market Size Forecast
10.3.1.1.1.By Value
10.3.1.2.Market Share Forecast
10.3.1.2.1.By Imaging Modality
10.3.1.2.2.By Type
10.3.1.2.3.By Mode of Delivery
10.3.1.2.4.By Usage Model
10.3.2.Saudi Arabia Vendor-Neutral Archive (VNA) and PACS Market Outlook
10.3.2.1.Market Size Forecast
10.3.2.1.1.By Value
10.3.2.2.Market Share Forecast
10.3.2.2.1.By Imaging Modality
10.3.2.2.2.By Type
10.3.2.2.3.By Mode of Delivery
10.3.2.2.4.By Usage Model
10.3.3.UAE Vendor-Neutral Archive (VNA) and PACS Market Outlook
10.3.3.1.Market Size Forecast
10.3.3.1.1.By Value
10.3.3.2.Market Share Forecast
10.3.3.2.1.By Imaging Modality
10.3.3.2.2.By Type
10.3.3.2.3.By Mode of Delivery
10.3.3.2.4.By Usage Model
10.3.4.Kuwait Vendor-Neutral Archive (VNA) and PACS Market Outlook
10.3.4.1.Market Size Forecast
10.3.4.1.1.By Value
10.3.4.2.Market Share Forecast

+44 20 8123 2220
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10.3.4.2.1.By Imaging Modality
10.3.4.2.2.By Type
10.3.4.2.3.By Mode of Delivery
10.3.4.2.4.By Usage Model

11.MARKET DYNAMICS

11.1.Drivers
11.2.Challenges

12.MARKET TRENDS DEVELOPMENTS

12.1.Recent Development
12.2.Mergers Acquisitions
12.3.Product Launches

13.PORTER'S FIVE FORCES ANALYSIS

13.1.Competition in the Industry
13.2.Potential of New Entrants
13.3.Power of Suppliers
13.4.Power of Customers
13.5.Threat of Substitute Products

14.COMPETITIVE LANDSCAPE

14.1.Agfa HealthCare NV
14.1.1.Business Overview
14.1.2.Products Services
14.1.3.Recent Developments
14.1.4.Financials (As Reported)
14.1.5.Key Personnel
14.1.6.SWOT Analysis
14.2.Dell Technologies Inc
14.3.FUJIFILM Holdings Corp
14.4.GE Healthcare Inc
14.5.International Business Machines Corp
14.6.Koninklijke Philips NV
14.7.Lexmark International Inc

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14.8.McKesson Corp
14.9.Novarad Corp
14.10.Siemens Healthineers AG

15.STRATEGIC RECOMMENDATIONS

16.ABOUT US DISCLAIMER

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