

Ophthalmology PACS Market Assessment, By Delivery Model [On-premises Model, Web/Cloud-Based Model], By Type [Integrated PACS, Standalone PACS], By End-user [Hospitals, Specialty Clinics and Ambulatory Surgical Centers, Others], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global ophthalmology PACS market is projected to witness a CAGR of 7.55% during the forecast period 2025-2032, growing from USD 156.66 million in 2024 to USD 280.44 million in 2032. The market's growth can be attributed to the rising adoption of teleophthalmology solutions, advancements in information technology, and increasing prevalence of eye diseases, such as glaucoma, cataracts, diabetic neuropathy, and diabetic macular edema, among others. The National Eye Institute estimates that 4.3 million Americans will have glaucoma by 2030.

The growing prevalence of ophthalmic diseases, along with the increasing efforts to improve vision care and the rising requirement for accurate and early detection methods and procedures, are expected to provide lucrative growth opportunities for the market. Meanwhile, the increasing efforts of governments across the globe to bolster the utilization of digital technologies in the healthcare sector are also augmenting the requirement for ophthalmology PACS.

Ophthalmology PACS also aids in streamlining clinical workflow and reduces the reliance on physical records, thus improving operational efficiency and diagnostic accuracy. The requirement for effective image management has significantly increased over the past few years due to the rising cases of vision impairment and the lack of availability of skilled professionals. By adopting technologies such as ophthalmology PACS, medical professionals are also able to reduce medical errors.

Expansion of the Geriatric Population Boosts Market Demand

The growth of the geriatric population is bolstering the market's demand as the older population is more susceptible to eye diseases and disorders, including glaucoma, diabetic retinopathy, cataracts, and age-related macular degeneration, among others. The World Health Organization (WHO) estimates that 1 in 6 people across the world will be 60 or older by 2030. This demographic shift is augmenting the requirement for advanced data management and ophthalmic imaging solutions, as ongoing

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monitoring and early detection are critical for treating and managing chronic eye conditions in the older population.

Ophthalmology PACS systems aid medical professionals in easily retrieving, sharing, and storing high-resolution eye images, ensuring treatment planning in a time-efficient manner. Thus, medical professionals across the globe are focusing on integrating modern PACS to address the increasing prevalence of age-related eye diseases.

New Product Launches Support Market Expansion

The growing efforts to introduce novel products are driving the growth of the market as they ensure the availability of technologies with advanced data management, imaging, and diagnostic capabilities to meet the evolving requirements of eye care providers. Innovative solutions with cloud-based PACS solutions, high-resolution imaging modalities, and artificial intelligence-powered diagnostic tools allow medical professionals to manage and detect conditions such as macular degeneration, glaucoma, and diabetic retinopathy with improved efficiency and accuracy. Thus, leading companies are focusing on launching new technologies to improve treatment outcomes. For instance, in March 2024, INFINITT Healthcare Co. Ltd. launched its new ophthalmology PACS, which has a state-of-the-art HTML5 viewer that provides a zero-footprint server-side rendered and zero download experience. The technology has been tailored to meet the specific requirements of ophthalmologists. Its worklist management interface streamlines the workflow of medical facilities and categorizes exams, allowing medical professionals to access comprehensive reports and historical data with ease.

Hospitals Account for a Significant Share of the Market

The segment's dominance can be attributed to its large-scale operations, comprehensive imaging requirements, and extensive patient volumes. Large hospitals have the resources and infrastructure to introduce integrated PACS for ensuring the security of data, streamlining complex workflow, and supporting multidisciplinary care teams. Hospitals are also focusing on adopting advanced technologies to improve clinical outcomes and promote digitalization. Their ability to maintain and invest in new digital solutions further allows them to expand their presence in the market.

Additionally, leading hospitals globally are partnering with major medical technology companies to provide digitalized solutions for improving patient diagnosis, providing lucrative growth opportunities for the market. For instance, in January 2023, Manipal Health Enterprises partnered with FUJIFILM India Private Limited to implement a large-scale PACS across its 45 teleradiology facilities and 23 hospitals across India to digitize the management and storage of sensitive medical images and documents and eliminate manual processes.

North America Holds a Major Market Share

The rapid expansion of the market in North America can be attributed to the increasing investments in the healthcare infrastructure in the region, strong presence of key market players, growing awareness about ophthalmic care, and increasing burden of ophthalmic diseases. The Center for Disease Control and Prevention estimates that about 12 million people in the United States who are 40 or older are living with vision impairment.

Additionally, increasing government efforts to promote digitalization of health records, along with the adoption of electronic medical record (EMR) systems, are further supporting the integration of PACS systems across ambulatory surgery centers, hospitals, and specialty clinics. Moreover, growing emphasis on research activities in combination with public health initiatives, including the Vision Health Initiative, is encouraging partnerships between healthcare providers and technology providers. Meanwhile, the market in the Asia-Pacific is expected to witness significant growth over the forecast period, owing to an increase in investments in healthcare infrastructure and exponential population growth in the region.

Impact of the U.S. Tariff on Global Ophthalmology PACS Market

The tariffs, which are part of a wider trade measure, and expected to affect medical devices manufactured overseas and imported into the United States. The increased financial strain due to the tariffs may force manufacturers to reassess their pricing strategies, resulting in increased costs for healthcare providers and end-users.

Various medical device manufacturers are considering diversifying their supply chains to mitigate the impact of the new tariffs. They are also focusing on shifting their production facilities to countries least affected by tariffs and investing in domestic manufacturing capabilities to reduce dependency on imports.

Moreover, medical professionals relying on imported products to provide ophthalmology care may face a rise in procurement costs, potentially straining budgets, especially in smaller hospitals and clinics, impacting the rate of adoption of advanced imaging technologies. In areas where healthcare funding is limited, access to ophthalmology care may further decline.

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Key Players Landscape and Outlook

The key players of the market are focusing on enhancing the overall ecosystem of advanced ophthalmic care, providing lucrative growth opportunities for the market. For instance, in April 2025, Carl Zeiss Meditec AG launched ZEISS DuraVision Gold UV, its latest innovation in lens coating, in India. This innovative product improves lens durability, clarity, and cleanability, improving patient outcomes and satisfaction in eye care. As premium lens technologies like DuraVision Gold UV gain traction, demand for comprehensive ophthalmic diagnostic and treatment solutions-including PACS is expected to rise as PACS systems are integral for managing and storing high-resolution ophthalmic images and patient data efficiently.

Table of Contents:

1. Project Scope and Definitions
2. Research Methodology
3. Impact of the U.S. Tariff on Global Ophthalmology PACS Market
4. Executive Summary
5. Global Ophthalmology PACS Market Outlook, 2018-2032F
 - 5.1. Market Size Analysis & Forecast
 - 5.1.1. By Value
 - 5.2. Market Share Analysis & Forecast
 - 5.2.1. By Delivery Model
 - 5.2.1.1. On-premises Model
 - 5.2.1.2. Web/Cloud-Based Model
 - 5.2.2. By Type
 - 5.2.2.1. Integrated PACS
 - 5.2.2.2. Standalone PACS
 - 5.2.3. By End-user
 - 5.2.3.1. Hospitals
 - 5.2.3.2. Specialty Clinics and Ambulatory Surgical Centers (ASCs)
 - 5.2.3.3. Others
 - 5.2.4. By Region
 - 5.2.4.1. North America
 - 5.2.4.2. Europe
 - 5.2.4.3. Asia-Pacific
 - 5.2.4.4. South America
 - 5.2.4.5. Middle East and Africa
 - 5.2.5. By Company Market Share Analysis (Top 5 Companies and Others - By Value, 2024)
 - 5.3. Market Map Analysis, 2024
 - 5.3.1. By Delivery Model
 - 5.3.2. By Type
 - 5.3.3. By End-user
 - 5.3.4. By Region
6. North America Ophthalmology PACS Market Outlook, 2018-2032F
 - 6.1. Market Size Analysis & Forecast
 - 6.1.1. By Value
 - 6.2. Market Share Analysis & Forecast
 - 6.2.1. By Delivery Model
 - 6.2.1.1. On-premises Model
 - 6.2.1.2. Web/Cloud-Based Model
 - 6.2.2. By Type

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- 6.2.2.1. □ Integrated PACS
- 6.2.2.2. □ Standalone PACS
- 6.2.3. □ By End-user
 - 6.2.3.1. □ Hospitals
 - 6.2.3.2. □ Specialty Clinics and Ambulatory Surgical Centers (ASCs)
 - 6.2.3.3. □ Others
- 6.2.4. □ By Country Share
 - 6.2.4.1. □ United States
 - 6.2.4.2. □ Canada
 - 6.2.4.3. □ Mexico
- 6.3. □ Country Market Assessment
 - 6.3.1. □ United States Ophthalmology PACS Market Outlook, 2018-2032F*
 - 6.3.1.1. □ Market Size Analysis & Forecast
 - 6.3.1.1.1. □ By Value
 - 6.3.1.2. □ Market Share Analysis & Forecast
 - 6.3.1.2.1. □ By Delivery Model
 - 6.3.1.2.1.1. □ On-premises Model
 - 6.3.1.2.1.2. □ Web/Cloud-Based Model
 - 6.3.1.2.2. □ By Type
 - 6.3.1.2.2.1. □ Integrated PACS
 - 6.3.1.2.2.2. □ Standalone PACS
 - 6.3.1.2.3. □ By End-user
 - 6.3.1.2.3.1. □ Hospitals
 - 6.3.1.2.3.2. □ Specialty Clinics and Ambulatory Surgical Centers (ASCs)
 - 6.3.1.2.3.3. □ Others
 - 6.3.2. □ Canada
 - 6.3.3. □ Mexico

*All segments will be provided for all regions and countries covered

- 7. □ Europe Ophthalmology PACS Market Outlook, 2018-2032F
 - 7.1. □ Germany
 - 7.2. □ France
 - 7.3. □ Italy
 - 7.4. □ United Kingdom
 - 7.5. □ Russia
 - 7.6. □ Netherlands
 - 7.7. □ Spain
 - 7.8. □ Turkey
 - 7.9. □ Poland
- 8. □ Asia-Pacific Ophthalmology PACS Market Outlook, 2018-2032F
 - 8.1. □ India
 - 8.2. □ China
 - 8.3. □ Japan
 - 8.4. □ Australia
 - 8.5. □ Vietnam
 - 8.6. □ South Korea
 - 8.7. □ Indonesia
 - 8.8. □ Philippines

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- 9. South America Ophthalmology PACS Market Outlook, 2018-2032F
 - 9.1. Brazil
 - 9.2. Argentina
 - 10. Middle East and Africa Ophthalmology PACS Market Outlook, 2018-2032F
 - 10.1. Saudi Arabia
 - 10.2. UAE
 - 10.3. South Africa
 - 11. Demand Supply Analysis
 - 12. Porter's Five Forces Analysis
 - 13. PESTLE Analysis
 - 14. Pricing Analysis
 - 15. Market Dynamics
 - 15.1. Market Drivers
 - 15.2. Market Challenges
 - 16. Market Trends and Developments
 - 17. Regulatory Landscape
 - 18. Case Studies
 - 19. Competitive Landscape
 - 19.1. Competition Matrix of Top 5 Market Leaders
 - 19.2. SWOT Analysis for Top 5 Players
 - 19.3. Key Players Landscape for Top 10 Market Players
 - 19.3.1. IBM Corporation
 - 19.3.1.1. Company Details
 - 19.3.1.2. Key Management Personnel
 - 19.3.1.3. Products and Services
 - 19.3.1.4. Financials (As Reported)
 - 19.3.1.5. Key Market Focus and Geographical Presence
 - 19.3.1.6. Recent Developments/Collaborations/Partnerships/Mergers and Acquisition
 - 19.3.2. Topcon Corporation
 - 19.3.3. Carl Zeiss Meditec AG
 - 19.3.4. Escalon Medical Corp.
 - 19.3.5. Heidelberg Engineering GmbH
 - 19.3.6. EyePACS, LLC
 - 19.3.7. Visbion Ltd.
 - 19.3.8. Universal Software Solutions Inc.
 - 19.3.9. Enghouse Video (Vidyo, Inc.)
 - 19.3.10. ScImage, Inc.
- *Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.
- 20. Strategic Recommendations
 - 21. About Us and Disclaimer

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