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Healthcare EDI Market by Transmission (Value added Network, Point-to-Point), Software (Claims (Submission, Status, Payment, Referral, Remittance), Supply (Procurement, Inventory), Service, End User (Hospital, ASC, Payer), Region - Global Forecast to 2029

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Abstracts

The global Healthcare EDI market is projected to reach USD 7.11 billion by 2029 from USD 4.47 billion in 2024, at a CAGR of 9.7 % from 2024 to 2029. The market's growth is fuelled by the rapid digitization of healthcare records and patient data, regulatory compliance requirements, the growing volume of claims submissions, growing demand from the healthcare insurance industry, and cost reductions associated with EDI implementation. The Workgroup for Electronic Data Interchange (WEDI) estimated that EDI implementation could save USD 1 per claim for health plans and insurers, USD 1.49 for physicians, USD 0.86 for hospitals, and USD 0.83 for other parties in the US. Furthermore, according to the CAQH Index 2023, the estimated volume of claim submissions for the medical industry rose by 8% to 9.5 billion in the US in 2023. However, integration with existing healthcare IT systems, data privacy, and security constraints pose a significant challenge within this market.

“Point-to-point EDI held the largest market share in the healthcare EDI market in 2023.”

The healthcare EDI market is segmented based on transmission type into Value Added Network (VAN) EDI and point-to-point EDI. The point-to-point EDI segment held the largest market share in 2023. Point-to-point EDI, also known as direct EDI, establishes a single line of exchange between the involved partners, requiring them to communicate with each other individually. In the healthcare industry, point-to-point EDI is used by

healthcare organizations to connect with clearinghouses or payers directly using an FTP or EDIINT (EDI over the Internet) software, thereby providing users greater control and security over their data. Reduction in intermediary costs, data security, and compliance with regulatory standards are some of the significant factors propelling market growth. However, interoperability issues and setup complexities are some of the factors restraining the market growth.

“By transaction type, the claims payment segment is expected to register the fastest growth over the forecast period.”

By transaction type, the healthcare EDI market is divided into claims submission, claims status, eligibility verification, claims payment, referral certification & authorization, payment remittance, and other EDI transactions. The claims payment segment is projected to be the fastest-growing segment over the forecast year. EDI in claims payment typically involves the automation of payment exchange between payers and providers, wherein the payment is sent directly and electronically from payers to providers through a value-added network (VAN). According to the CAQH Index 2023, fully electronic claim payment could lead to a potential cost savings opportunity of USD 524 million annually for the medical industry. The increasing demand for quick claim adjudication, the rising adoption of electronic claims payment processes by healthcare payers, and the growing complexity of reimbursement models are some of the major factors driving the market growth.

“Asia Pacific is estimated to register the highest CAGR over the forecast period.”

The Healthcare EDI market is segmented segments, namely, North America, Europe, Asia Pacific, Latin America, and Middle East & Africa. The healthcare EDI market in Asia Pacific is projected to register at the highest CAGR rate during the forecast period. The growth of this region is due to growth in healthcare infrastructure, government initiatives to modernize and digitalize the healthcare industry, and growth in the health insurance industry. Countries such as Japan and China are focusing on developing cost-effective solutions emphasizing the importance of real-time public health data sharing, rapid growth in healthcare insurance coverage, growth in cross-border healthcare services, adopting advanced technologies, and regulatory mandates for healthcare data standardization (especially in China and Japan) which bolster the Asia Pacific market growth. For instance, the implementation of the Healthy China 2030 Plan is driving the country’s health insurance system and subsequent HCIT adoption. China expects to achieve health equity by 2030. Moreover, growing medical tourism, rising healthcare expenditure, increased health insurance penetration, and growing government support

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are other factors augmenting the market growth.

Breakdown of supply-side primary interviews by company type, designation, and region:

By Company Type: Tier 1 (40%), Tier 2 (35%), and Tier 3 (25%)

By Designation: Managers (40%), Directors (35%), and Others (25%)

By Region: North America (40%), Europe (30%), Asia Pacific (20%), Latin America (5%) and Middle East Africa (5%)

List of Companies Profiled in the Report

McKESSON CORPORATION (US)

UnitedHealth Group Incorporated (US)

IBM (US)

Cognizant (US)

Boomi (US)

True Commerce, Inc. (US)

athenahealth (US)

Axway (US)

Experian Information Solutions, Inc. (US)

Veradigm LLC (US)

The SSI Group, LLC (US)

NTT DATA Group Corporation (Japan)

Comarch SA. (Poland)

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Availity, LLC. (US)

Quadax, Inc. (US)

Waystar. (US)

PLEXIS Healthcare Systems (US)

Inovalon. (US)

123 EDI (US)

Cirius Group, Inc. (US)

Epicor Software Corporation (US)

OSP Labs (US)

Nalashaa. (US)

WNS (US)

PilotFish, Inc. (US)

Cleo (US)

Research Coverage

This research report categorizes the Healthcare EDI market by component (services [managed services and professional services], and software), transmission type (VAN EDI, and point-to-point EDI), end user (Healthcare providers, healthcare payers, medical device companies, pharmaceutical and biotechnology companies, and pharmacies), and region. The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the healthcare EDI market. A thorough analysis of the key industry players has been done to provide insights into their business overview, offerings, and key strategies such as acquisitions, collaborations, agreements, mergers, product launches

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& updates, partnerships, expansions, and other recent developments associated with the healthcare EDI market. Competitive analysis of upcoming startups in the healthcare EDI market ecosystem is covered in this report.

Reasons to Buy the Report

The report will help market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall healthcare EDI market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (supportive regulations for transaction processes, growing necessity to reduce healthcare costs, reduction in costs and improved operational efficiency with healthcare EDI software, rising demand for streamlined claims management, API integration accelerating claims management), restraints (ensuring data security is a major concern for both patients and EDI Users, elevated costs associated with implementing EDI software), opportunities (rising trend in outsourcing EDI services, adoption of ICD-11 standards, utilizing real-time data exchange, telehealth and remote monitoring expansion), and challenges (integration of diverse healthcare IT solutions across the industry, needs and limitations of end users, interoperability issues in legacy systems, complexities in transactions and healthcare network) influencing the growth of the healthcare EDI market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the healthcare EDI market

Market Development: Comprehensive information about lucrative markets – the report analyses the healthcare EDI market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the healthcare EDI market

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Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as McKESSON CORPORATION (US), UnitedHealth Group Incorporated (US), Cognizant (US), IBM (US), Veradigm LLC (US), athenahealth (US), Axway (US), Boomi (US), and True Commerce, Inc. (US), etc. among others in healthcare EDI market.

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