

# **Clinical Decision Support (CDS) for Chronic Care Market Forecasts to 2032 – Global Analysis By Component (Software, Services and Other Components), Product (Standalone CDS Systems, Mobile-Based CDS Tools, Integrated CDS with EHR, AI-Driven CDS Platforms and Other Products), Therapeutic Area, Application, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Clinical Decision Support (CDS) for Chronic Care Market is accounted for \$0.9 billion in 2025 and is expected to reach \$2.2 billion by 2032 growing at a CAGR of 12.5% during the forecast period. Clinical Decision Support (CDS) for Chronic Care is to intelligent health IT systems that deliver patient-specific insights to aid clinicians in managing long-term conditions. These tools integrate evidence-based guidelines, real-time data, and predictive analytics to optimize diagnosis, treatment planning, and monitoring. CDS enhances care quality by identifying risks, suggesting interventions, and streamlining workflows. In chronic disease management, it supports continuity, reduces errors, and promotes timely, personalized care decisions aligned with clinical protocols and patient history

Market Dynamics:

Driver:

Growing adoption of electronic health records (EHRs) and digital health

Integration of CDS with EHR platforms enables real-time clinical insights, streamlining decision-making for physicians and improving patient outcomes. Digital health innovations, including mobile apps and cloud-based analytics, are enhancing the accessibility and scalability of CDS solutions. These technologies support longitudinal tracking of chronic conditions, enabling proactive interventions. Moreover, interoperability standards are evolving to facilitate seamless data exchange across care settings, further boosting CDS utility.

#### Restraint:

##### Alert fatigue and usability issues

Despite their clinical value, CDS systems often generate excessive alerts, leading to desensitization among healthcare providers. This phenomenon, known as alert fatigue, can result in critical warnings being overlooked, compromising patient safety. Additionally, poorly designed user interface and complex workflows hinder system adoption, especially in high-volume clinical environments. Customization challenges and lack of intuitive navigation reduce operational efficiency.

#### Opportunity:

##### Patient-centered and shared decision-making tools

Tools that facilitate shared decision-making—such as risk calculators, treatment comparison dashboards, and preference-sensitive algorithms—are gaining traction. These systems enhance transparency and foster collaborative discussions between patients and providers. As chronic conditions often require long-term management, engaging patients in treatment planning improves adherence and satisfaction. The growing emphasis on value-based care is further encouraging the integration of patient-centric functionalities into CDS frameworks.

#### Threat:

##### Lack of user adoption and acceptance

Concerns about clinical autonomy, data reliability, and workflow disruption contribute to low adoption rates. Additionally, insufficient training and lack of institutional support can hinder effective implementation. In some cases, CDS tools are perceived as burdensome rather than beneficial, especially when they fail to align with existing

clinical practices. Overcoming these barriers requires targeted education, stakeholder engagement, and evidence-based validation of CDS efficacy.

#### Covid-19 Impact:

The pandemic accelerated digital transformation in healthcare, indirectly benefiting the CDS market for chronic care. With in-person consultations limited, providers increasingly relied on remote monitoring and virtual decision support tools to manage chronic conditions. CDS systems played a crucial role in triaging patients, optimizing medication regimens, and identifying high-risk individuals. However, initial disruptions in IT infrastructure and resource allocation delayed some deployments.

The standalone CDS systems segment is expected to be the largest during the forecast period

The standalone CDS systems segment is expected to account for the largest market share during the forecast period due to their flexibility and compatibility with diverse healthcare environments. These systems operate independently of EHRs, allowing integration with various data sources and third-party applications. Their modular architecture supports tailored functionalities for chronic disease management, including predictive analytics and evidence-based guidelines. The segment benefits from growing demand in outpatient settings, where standalone tools offer cost-effective and scalable solutions.

The diabetes & chronic disease management segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the diabetes & chronic disease management segment is predicted to witness the highest growth rate driven by rising global disease burden and demand for continuous care solutions. CDS tools in this domain offer personalized treatment recommendations, medication tracking, and lifestyle interventions. Integration with wearable devices and mobile health apps enables real-time data capture, supporting dynamic decision-making. The segment is also benefiting from government initiatives promoting digital therapeutics and chronic care coordination.

#### Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share attributed to expanding healthcare infrastructure and rising chronic disease

prevalence. Countries like China, India, and Japan are investing heavily in digital health ecosystems, including CDS integration with national EHR programs. The region's large patient population and increasing adoption of telemedicine are driving demand for scalable decision support tools. Regulatory reforms and public-private partnerships are further catalyzing market growth.

#### Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR fueled by advanced healthcare digitization and strong policy support for clinical innovation. The region boasts a mature EHR landscape, facilitating seamless CDS deployment across hospitals and clinics. Ongoing research in AI and machine learning is enhancing the sophistication of CDS algorithms, particularly for chronic disease prediction and management. Reimbursement models favoring value-based care are incentivizing providers to adopt CDS tools that improve outcomes and reduce costs.

#### Key players in the market

Some of the key players in Clinical Decision Support (CDS) for Chronic Care Market include Epic Systems Corporation, Cerner Corporation (Oracle Health), IBM Watson Health, Siemens Healthineers, Koninklijke Philips N.V., Wolters Kluwer Health, Allscripts Healthcare Solutions, McKesson Corporation, GE HealthCare, Agfa-Gevaert Group, Athenahealth, Inc., NextGen Healthcare, Inc., Elsevier Clinical Solutions, Medical Information Technology, Inc. (MEDITECH), Carestream Health, eClinicalWorks, Health Catalyst, and Zynx Health.

#### Key Developments:

In June 2025, Siemens Healthineers announced a theranostics research collaboration with a leading U.S. hospital to create a Therapy Command Center using advanced imaging (long-field-of-view PET/CT). The collaboration aims to accelerate theranostics research, optimize treatment pathways and provide clinicians integrated imaging+lab data to tailor therapies.

In June 2025, IBM unveiled watsonx AI Labs in New York City to co-create generative AI solutions with clients, startups and the local talent ecosystem. The initiative includes developer resources, partnerships (including acquisition activity to support the lab) to accelerate enterprise AI use cases in healthcare and other industries.

In April 2025, McKesson completed the acquisition of an 80% controlling interest in PRISM Vision Holdings (ophthalmology/retina services). McKesson said the transaction expands its specialty clinical services footprint and strengthens distribution/clinical reach in ophthalmology.

#### Components Covered:

Software

Services

Other Components

#### Products Covered:

Standalone CDS Systems

Mobile-Based CDS Tools

Integrated CDS with EHR

AI-Driven CDS Platforms

Other Products

#### Therapeutic Areas Covered:

Cardiology

Oncology

Critical Care

Infectious Diseases & Antimicrobial Stewardship

Diabetes & Chronic Disease Management

Medication Management

Other Therapeutic Areas

Applications Covered:

Clinical Guidelines

Drug Allergy Alerts

Drug-Drug Interactions

Drug Dosing Support

Clinical Reminders

Therapeutic Planning

Patient Monitoring

Chronic Disease Management

Diagnostic Support

Other Applications

End Users Covered:

Hospitals

Clinics

Ambulatory Surgical Centers

Diagnostic & Imaging Centers

Pharmaceutical & Biotechnology Companies

Research Institutes

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends

- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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