Global E-prescribing Market - Focused Insights 2024-2029

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Report description:

The global e-prescribing market is expected to grow at a CAGR of 21.87% from 2023 to 2029.

RECENT VENDORS ACTIVITIES

- In 2024, VieCure, a cancer care company, announced that it is integrating e-prescribing and medication management solutions from health technology pioneer DrFirst into its clinical decision support system.
- In October 2021, Veradigm, a division of Allscripts Healthcare Solutions, and CareMetx, LLC formed a strategic alliance to integrate CareMetx's support services into Veradigm's AccelRx specialty medication platform. This partnership was designed to streamline and expedite the specialty medication approval process, enabling healthcare providers to better manage the complex journey of specialty prescriptions. By bringing CareMetx's services into AccelRx, the collaboration aims to enhance overall patient care, creating a more efficient, end-to-end experience from prescription to medication delivery.

KEY TAKEAWAYS

- By Type: The standard e-prescribing segment holds the largest market share. The growth of the segment is driven by the need for efficiency, patient safety, and regulatory compliance.
- By Delivery Mode: The web & cloud-based segment shows the highest growth of 22.33%, driven by scalability, accessibility, and integration capabilities.
- By Modality: The integrated segment accounts for the largest market share due to its ability to streamline clinical workflows and enhance patient safety.
- By Medications: The cardiovascular segment holds the largest market share of over 19%. The segmental growth is primarily due to e-prescribing in cardiovascular care has improved the accuracy and speed of medication dispensing.
- By End-Users: The healthcare facilities segment shows the highest growth, as it significantly improved workflow, patient safety, and operational efficiency.
- By Geography: North America dominates & holds the largest global e-prescribing market share, due to regulatory initiatives and

the increasing need for efficient, digital healthcare solutions.

-Growth Factor: The global e-prescribing market is set to grow due to the adoption of cloud-based digital record-keeping and the expansion of e-prescribing into public hospitals and other health settings.

MARKET OPPORTUNITIES & DRIVERS

The Expansion of E-prescribing Into Public Hospitals and Other Health Settings

The expansion of ePrescribing into public hospitals is transforming healthcare by enhancing medication management, accuracy, and operational efficiency. Traditionally slower to adopt new technologies due to size and complexity, public hospitals are now increasingly embracing ePrescribing, largely driven by government regulations aimed at improving healthcare outcomes, reducing medication errors, and cutting costs. In the U.S., laws like MACRA encourage adoption, while countries in the EU, such as the UK and Sweden, have established national programs mandating digital prescriptions in public hospitals. This regulatory support promotes standardization, enhances patient safety, and streamlines care for large patient populations. ePrescribing also improves medication management by making prescriptions legible and accurate and by providing comprehensive medication histories, which helps avoid adverse drug interactions and over-prescription-a critical feature in high-volume public hospital settings.

The Adoption of Cloud-based Digital Record Keeping

The adoption of cloud-based digital record-keeping is transforming how organizations manage, store, and access information. As more businesses transition to digital systems, cloud technology has emerged as a vital tool for securely housing vast amounts of data. In healthcare, for example, the shift from paper-based records to cloud-based systems is enabling efficient storage of electronic health records (EHRs), enhancing accessibility for healthcare providers, and improving patient care by allowing for real-time data sharing across different locations. Cloud-based digital record-keeping allows organizations to access data from any location with an internet connection, streamlining operations for remote teams. In industries like healthcare, education, and finance, this flexibility is vital for maintaining seamless service delivery. Healthcare professionals, for instance, can instantly retrieve patient records, leading to more informed decision-making and reduced chances of medical errors. Cloud solutions also eliminate the need for extensive physical storage, significantly reducing costs associated with maintaining on-site servers or filing systems. One of the key advantages of cloud-based record-keeping is the robust security measures integrated into these systems. Cloud service providers often invest in cutting-edge security protocols, including encryption, multi-factor authentication, and regular security updates, to protect sensitive data. This is particularly important for industries handling confidential information, such as healthcare providers adhering to HIPAA regulations or financial institutions managing client data. Compliance with industry standards becomes more streamlined with cloud technology, as service providers ensure that their systems are up to date with the latest regulatory requirements.

Rising Focus on Reducing The Abuse of Controlled Substances

Amid the opioid crisis, reducing controlled substance abuse has become a priority in healthcare. E-prescribing systems, particularly those with Electronic Prescriptions for Controlled Substances (EPCS) capabilities, are essential for improving prescription monitoring and safety. Integrating Prescription Drug Monitoring Programs (PDMPs) into e-prescribing allows providers to review a patient's medication history, identifying misuse patterns like "doctor shopping" and ensuring more informed, secure prescribing. Additionally, clinical decision support tools within e-prescribing systems alert prescribers to risks like drug interactions or high doses, promoting safer prescribing practices and minimizing misuse of controlled substances.

INDUSTRY RESTRAINTS

Lack of Interoperability Between Various Systems

Interoperability in healthcare, the seamless exchange and interpretation of data across systems, faces significant challenges despite technological progress. A major barrier is the lack of standardized data formats and protocols, which complicates access to comprehensive patient information. Limited policies supporting interoperability, along with vendor resistance to data sharing due to competitive concerns, further restrict seamless information flow. Additionally, integrating legacy systems with modern technologies is difficult and costly, slowing adoption and limiting the benefits of a connected healthcare ecosystem. Initiatives like the 21st Century Cures Act aim to address these issues, but significant hurdles remain for coordinated care.

SEGMENTATION INSIGHTS

INSIGHTS BY TYPE

The global e-prescribing market by type is segmented into standard e-prescribing and e-prescribing for controlled substances (EPCS). The standard e-prescribing segment holds the largest market share. The adoption of standard e-prescribing has significantly evolved, driven by the need for efficiency, patient safety, and regulatory compliance. In recent years, healthcare providers increasingly rely on electronic systems to manage prescriptions, reducing errors and streamlining workflows. Recent developments include new federal rules for Medicare Part D, mandating the adoption of updated National Council for Prescription Drug Programs (NCPDP) standards by 2028. These standards aim to improve interoperability and real-time benefit sharing, further enhancing patient care by ensuring that prescription details, including cost and coverage, are available at the point of care. Moreover, the integration of e-prescribing with electronic health records (EHRs) has improved the seamless exchange of data between providers and pharmacies, thus helping segmental growth.

By Type
- Standard E-prescribing
- E-prescribing for Controlled Substances (EPCS)

INSIGHTS BY DELIVERY MODE

The global e-prescribing market by delivery mode is categorized into web & cloud-based and on-premises & desktop. The web & cloud-based segment shows significant growth, with the fastest-growing CAGR of 22.33%. The rapid adoption of web and cloud-based e-prescribing systems is transforming healthcare by providing scalable, accessible, and integrated tools for providers. These solutions streamline the prescribing process, minimize medication errors, and boost patient safety. Cloud-based systems, in particular, offer the flexibility of accessing and sharing prescription data remotely, supporting the rise of telemedicine and remote consultations. Their compatibility with electronic health records (EHR) and other healthcare systems ensures seamless data flow, enhancing decision-making and patient outcomes. Advances in cloud computing are poised to drive further adoption, contributing significantly to the improvement of healthcare services.
By Delivery Mode
- Web & Cloud Based
- On-premises & Desktop

INSIGHTS BY MODALITY

The global e-prescribing market by modality is segmented into integrated and standalone. The integrated segment accounted for the largest market share due to its ability to streamline clinical workflows and enhance patient safety. These systems are directly incorporated into broader electronic health record (EHR) platforms, allowing seamless access to patient data, medical histories, and drug interactions, enabling healthcare providers to make informed decisions efficiently at the point of care. A significant driver of integrated e-prescribing adoption is the push for more effective medication management and error reduction. The

integration of prescription tools with EHR systems allows providers to review patients' complete medical profiles, assess contraindications, and track adherence, which is especially crucial for chronic disease management.

By Modality
- Integrated
- Standalone

INSIGHTS BY MEDICATION

Based on the medication, the cardiovascular segment occupies the largest share of over 19% of the global e-prescribing market. E-prescribing is increasingly recognized as a vital tool in managing cardiovascular medications, offering significant benefits in patient care and treatment outcomes. The integration of electronic prescribing systems in cardiology enhances efficiency, safety, and adherence to treatment protocols, particularly for conditions like hypertension, heart failure, and atrial fibrillation. One of the primary advantages of e-prescribing in cardiovascular care is the improved accuracy and speed of medication dispensing. Electronic systems help reduce errors associated with handwritten prescriptions, such as misinterpretations or illegibility, which can be particularly crucial when prescribing medications like anticoagulants or statins that require precise dosing. The direct transmission of prescriptions to pharmacies streamlines the process, enabling quicker access to medications for patients who often require immediate treatment.

By Medication
- Cardiovascular
- Anti-Infectives
- Oncology
- Pain Medication
- Behavioral & Mental Health
- Others

INSIGHTS BY END-USER

Based on the end-user, the healthcare facilities segment shows the highest growth, as it significantly improved workflow, patient safety, and operational efficiency. E-prescribing offers significant advantages, notably in reducing medication errors often linked to handwritten prescriptions. Transitioning to e-prescribing has proven to lower error rates substantially. Integrating e-prescribing with electronic health records (EHR) allows access to comprehensive patient data, including medication histories and drug interaction alerts, facilitating informed prescribing decisions. This integration enhances safety and supports tracking patient outcomes and adherence, thereby improving overall care quality. E-prescribing also brings security and convenience while reducing costs through efficient processes, making it essential in modern healthcare. As technology advances and adoption rates increase, the benefits of e-prescribing will continue to grow.

By End-Users
- Technology Vendors
- Independent & Specialty Pharmacies
- Healthcare Facilities
- PBM & Payors

GEOGRAPHICAL ANALYSIS

North America dominates and holds the largest share of the global e-prescribing market. Both the US and Canada have

established mandates to encourage the use of EHR. The North American e-prescribing market is projected to grow at a strong pace, with the U.S. leading due to the emphasis on improving patient safety and minimizing prescription errors. The implementation of integrated EHR systems that include e-prescribing capabilities is a key factor, in reducing manual errors and ensuring better access to patient medication histories. In the US, incentive programs were created to boost EHR usage, while Canada mandated to have a baseline EHR record available for all healthcare professionals. Such initiatives increased the growth of EHR in both countries and also raised the adoption of e-prescribing by several healthcare providers.

By Geography
-　North America
o　US
o　Canada
-　Europe
o　UK
o　Italy
o　Spain
-　APAC
o　China
o　Japan
o　Australia
o　India
o　South Korea
-　Latin America
o　Brazil
o　Mexico
o　Argentina
-　Middle East & Africa
o　Turkey
o　Saudi Arabia
o　South Africa

COMPETITIVE LANDSCAPE

The global e-prescribing market report consists of exclusive data on 28 vendors. The market is witnessing rapid growth, driven by international and regional players offering solutions with advanced features like clinical decision support and electronic prior authorization. The market is expected to expand further as new vendors collaborate with established software providers. While the large players dominate, several mid-sized and emerging vendors such as DrFirst, Qualifacts, and Practice Fusion are gaining market traction, especially in niche areas like stand-alone solutions for small practices or private clinics. These companies often cater to healthcare providers who do not need comprehensive EHR systems but want efficient e-prescribing functionalities. Their flexibility and lower costs make them attractive to smaller healthcare organizations. The competitive landscape of the global e-prescribing market is characterized by strong competition among established and emerging players, a growing preference for integrated and cloud-based solutions, and a focus on meeting regulatory requirements across regions.

Key Vendors
-　Surescripts
-　DrFirst
-　Practice Fusion
-　RXNT

-	CoverMyMeds
-	Greenway Health
-	Qualifacts

Other Prominent Vendors
-	AdvancedMD
-	Aegis Healthcare
-	Canada Health Infoway
-	Change Healthcare
-	Chetu
-	Daw Systems
-	DoseSpot
-	DrChrono
-	Henry Schein
-	MDToolbox
-	Sisgain
-	Streamline Healthcare Solutions
-	CLEO Systems
-	ModuleMD
-	MediPro
-	OmniMD
-	iA (Innovation Associates)
-	Foundation Systems
-	Netsmart
-	Outcomes
-	RxMaster

KEY QUESTIONS ANSWERED:

1.	Who are the key players in the global e-prescribing market?
2.	How big is the global e-prescribing market?
3.	What are the latest trends in the global e-prescribing market?
4.	Which region has the largest market share of the global e-prescribing market?
5.	Which delivery mode has the largest share of the global e-prescribing market?

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