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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Report description:

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 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)
- 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)

o WNS (US)
o PilotFish, Inc. (US)
o 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 & 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
- 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.

Table of Contents:

1 INTRODUCTION 35
1.1 STUDY OBJECTIVES 35
1.2 MARKET DEFINITION 35
1.3 MARKET SCOPE 36
1.3.1 MARKETS COVERED 36
1.3.2 INCLUSIONS & EXCLUSIONS 37
1.3.3 YEARS CONSIDERED 38
1.3.4 CURRENCY CONSIDERED 38
1.4 MARKET STAKEHOLDERS 39

1.5 SUMMARY OF CHANGES 39
2 RESEARCH METHODOLOGY 41
2.1 RESEARCH DATA 41
2.1.1 SECONDARY DATA 42
2.1.1.1 Key data from secondary sources 42
2.1.2 PRIMARY DATA 43
2.1.2.1 Primary sources 43
2.1.2.2 Key industry insights 44
2.1.2.3 Breakdown of primary interviews (supply side): By company type, designation, and region 44
2.2 MARKET SIZE ESTIMATION 45
2.3 MARKET BREAKDOWN AND DATA TRIANGULATION 51
2.4 MARKET SHARE ESTIMATION 52
2.5 STUDY ASSUMPTIONS 52
2.6 LIMITATIONS 52
2.6.1 METHODOLOGY-RELATED LIMITATIONS 52
2.6.2 SCOPE-RELATED LIMITATIONS 53
2.7 RISK ASSESSMENT 53
3 EXECUTIVE SUMMARY 54
4 PREMIUM INSIGHTS 58
4.1 HEALTHCARE EDI MARKET OVERVIEW 58
4.2 HEALTHCARE EDI MARKET: REGIONAL MIX 59
4.3 NORTH AMERICA: HEALTHCARE EDI MARKET, BY END USER AND COUNTRY 60
4.4 HEALTHCARE EDI MARKET: GEOGRAPHIC SNAPSHOT 61
?
5 MARKET OVERVIEW 62
5.1 INTRODUCTION 62
5.2 MARKET DYNAMICS 62
5.2.1 DRIVERS 63
5.2.1.1 Supportive regulations for transaction processes 63
5.2.1.2 Growing requirement to curb healthcare costs 64
5.2.1.3 Healthcare EDI software provides low costs and improved operational efficiency 65
5.2.1.4 Increasing demand for streamlined claims management 66
5.2.1.5 Acceleration of claims management with API integration 66
5.2.2 RESTRAINTS 66
5.2.2.1 Concerns associated with data security 66
5.2.2.2 High software implementation costs 69
5.2.3 OPPORTUNITIES 69
5.2.3.1 Rising trend of outsourcing EDI services 69
5.2.3.2 Adoption of ICD-11 guidelines 70
5.2.3.3 Benefits of real-time data exchange 70
5.2.3.4 Expansion of telehealth and remote monitoring capabilities 71
5.2.4 CHALLENGES 71
5.2.4.1 Integration of healthcare IT solutions 71
5.2.4.2 End-user limitations & requirements 72
5.2.4.3 Interoperability issues in legacy systems 72
5.2.4.4 Complexities associated with transactions 72
5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES 73

5.4 HEALTHCARE EDI STANDARDS 73
5.4.1 ANSI X12 73
5.4.2 EDIFACT 73
5.4.3 OTHER STANDARDS 74
5.5 INDUSTRY TRENDS 75
5.5.1 ADOPTION OF INTEROPERABILITY STANDARDS 75
5.5.2 GROWTH OF VALUE-BASED CARE MODELS 75
5.5.3 INCREASING EMPHASIS ON DATA SECURITY & PRIVACY 76
5.5.4 GROWING FOCUS ON INTEGRATION PLATFORM AS A SERVICE (IPAAS) 76
5.5.5 INCREASING USE OF EDI IN SUPPLY CHAIN & DISTRIBUTION INDUSTRY 77
5.6 SUPPLY CHAIN ANALYSIS 77
5.7 ECOSYSTEM ANALYSIS 78
5.8 TECHNOLOGY ANALYSIS 80
5.8.1 KEY TECHNOLOGIES 80
5.8.1.1 REST APIS 80
5.8.1.2 Real-time data exchange 80
5.8.1.3 JSON or XML Conversion 81
5.8.1.4 EDI as a service (EDIAAS) 81
5.8.2 COMPLEMENTARY TECHNOLOGIES 81
5.8.2.1 Health information exchange 81
5.8.2.2 Electronic health records (EHRs) 81
5.8.2.3 Healthcare middleware solutions 82
5.8.3 ADJACENT TECHNOLOGIES 82
5.8.3.1 AI and ML 82
5.8.3.2 Blockchain technology 82
5.9 PORTER'S FIVE FORCES ANALYSIS 83
5.9.1 INTENSITY OF COMPETITIVE RIVALRY 84
5.9.2 BARGAINING POWER OF SUPPLIERS 84
5.9.3 BARGAINING POWER OF BUYERS 84
5.9.4 THREAT OF SUBSTITUTES 84
5.9.5 THREAT OF NEW ENTRANTS 84
5.10 KEY STAKEHOLDERS & BUYING CRITERIA 85
5.10.1 KEY STAKEHOLDERS IN BUYING PROCESS 85
5.10.2 BUYING CRITERIA 86
5.11 PRICING ANALYSIS 86
5.11.1 AVERAGE SELLING PRICE TREND, BY REGION (QUALITATIVE) 87
5.11.2 INDICATIVE PRICING ANALYSIS, BY SOFTWARE 87
5.12 REGULATORY LANDSCAPE 88
5.12.1 REGULATORY SCENARIO 88
5.12.1.1 North America 88
5.12.1.1.1 US 88
5.12.1.1.2 Canada 89
5.12.1.2 Europe 90
5.12.1.3 Asia Pacific 90
5.12.1.3.1 China 90
5.12.1.3.2 Japan 90
5.12.1.3.3 India 91

5.12.1.4 Middle East & Africa 91
5.12.1.5 Latin America 91
5.12.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 92
5.13 KEY CONFERENCES & EVENTS, 2025-2026 95
5.14 CASE STUDY ANALYSIS 96
5.14.1 TRANSFORMING CLAIMS MANAGEMENT WITH OPTUM CLAIMS MANAGER 96
5.14.1.1 Use case 1: Optum claims manager enhances revenue management & compliance for North Carolina 96
5.14.2 VIBRA HEALTHCARE'S SUCCESS WITH WAYSTAR 96
5.14.2.1 Use case 2: Streamlining billing and enhancing cost reduction with Waystar 96
?
5.14.3 ENHANCING PHARMACY CLAIMS EFFICIENCY WITH RELAYRX 97
5.14.3.1 Use case 3: Streamlining pharmacy reimbursements and improving patient outcomes 97
5.15 PATENT ANALYSIS 97
5.15.1 PATENT PUBLICATION TRENDS FOR HEALTHCARE EDI 97
5.15.2 INSIGHTS: JURISDICTION AND TOP APPLICANT ANALYSIS 98
5.16 END-USER ANALYSIS 101
5.16.1 UNMET NEEDS FOR END USERS IN HEALTHCARE EDI MARKET 101
5.16.2 END-USER EXPECTATIONS 102
5.17 INVESTMENT & FUNDING SCENARIO 102
5.18 HEALTHCARE EDI BUSINESS MODEL ANALYSIS 103
5.18.1 TOP USE CASES & MARKET POTENTIAL 104
5.18.1.1 Key use cases 105
5.18.2 CASE STUDIES OF AI/GENERATIVE AI IMPLEMENTATION 105
5.18.2.1 Case study 1: Simplification of prior authorization with Availity AuthAI 105
5.18.2.2 Case study 2: Automating claims management with implementation of AI 106
5.18.2.3 Case study 3: Enhancement of supply chain with AI-powered solution 106
5.18.3 IMPACT OF AI/GEN AI ON INTERCONNECTED & ADJACENT ECOSYSTEMS 107
5.18.3.1 Electronic health records market 107
5.18.3.2 Medical billing market 107
5.18.3.3 Healthcare revenue cycle management market 108
5.18.3.4 Health information exchange market 108
5.18.4 USER READINESS AND IMPACT ASSESSMENT 108
5.18.4.1 User readiness 108
5.18.4.1.1 Healthcare providers 108
5.18.4.1.2 Healthcare payers 108
5.18.4.2 Impact assessment 109
5.18.4.2.1 User A: Healthcare providers 109
5.18.4.2.1.1 Implementation 109
5.18.4.2.1.2 Impact 109
5.18.4.2.2 User B: Academic research institutes 109
5.18.4.2.2.1 Implementation 109
5.18.4.2.2.2 Impact 109
6 HEALTHCARE EDI MARKET, BY COMPONENT 111
6.1 INTRODUCTION 112
6.2 SERVICES 112
6.2.1 MANAGED SERVICES 114
6.2.1.1 Claims management services 115

6.2.1.1.1 Rising complexities associated with healthcare billing and regulatory requirements to boost demand 115
6.2.1.2 Supply management services 116
6.2.1.2.1 Growing focus on automation and real-time data integration to drive market 116
6.2.2 PROFESSIONAL SERVICES 117
6.2.2.1 Implementation services 119
6.2.2.1.1 Increasing demand for interoperability & integration of cloud systems to fuel market 119
6.2.2.2 Maintenance & support services 120
6.2.2.2.1 Requirement of software updates and real-time support to boost demand 120
6.2.2.3 Other services 121
6.3 SOFTWARE 122
6.3.1 SOFTWARE, BY DEPLOYMENT MODEL 123
6.3.1.1 On-premise EDI model 124
6.3.1.1.1 Enhanced control over data security to support market growth 124
6.3.1.2 Web/Cloud-based EDI model 125
6.3.1.2.1 High uptake of SaaS models to propel market 125
6.3.2 SOFTWARE, BY TRANSACTION TYPE 126
6.3.2.1 Claims management software 127
6.3.2.1.1 Claims submission 128
6.3.2.1.1.1 Growing need for improved claims accuracy and low administration costs to drive market 128
6.3.2.1.2 Claims status 129
6.3.2.1.2.1 Growing demand for claims checks with minimal manual intervention to fuel uptake 129
6.3.2.1.3 Eligibility verification 130
6.3.2.1.3.1 Growing focus on real-time patient insurance validation to boost market 130
6.3.2.1.4 Claims payment 131
6.3.2.1.4.1 Need for streamlined reimbursement processes to fuel uptake 131
6.3.2.1.5 Referral certification & authorization 132
6.3.2.1.5.1 Growing requirement for healthcare investments to drive market 132
6.3.2.1.6 Payment remittance 133
6.3.2.1.6.1 Growing focus on streamlining payment facilities to drive market 133
6.3.2.1.7 Other EDI claims transactions 134
6.3.2.2 Supply management software 135
6.3.2.2.1 Procurement management 137
6.3.2.2.1.1 Rising demand for supply chain efficiencies to fuel uptake 137
6.3.2.2.2 Inventory management 138
6.3.2.2.2.1 Growing requirement for real-time inventory tracking to drive market 138
?
6.3.2.2.3 Order management 139
6.3.2.2.3.1 Rising volume of medical supplies & pharmaceuticals to support market growth 139
7 HEALTHCARE EDI MARKET, BY TRANSMISSION TYPE 140
7.1 INTRODUCTION 141
7.2 VALUE-ADDED NETWORK (VAN) EDI 141
7.2.1 INCREASING DEMAND FOR CLEARINGHOUSE SERVICES TO DRIVE MARKET 141
7.3 POINT-TO-POINT EDI 143
7.3.1 UTILIZATION BY LARGE ORGANIZATIONS FOR VOLUME TRANSACTIONS TO BOOST DEMAND 143
7.4 MULTI-CHANNEL EDI 144
7.4.1 GRADUAL SHIFT TOWARDS API-BASED EXCHANGE FOR ENHANCED INTEROPERABILITY TO PROPEL MARKET 144
8 HEALTHCARE EDI MARKET, BY END USER 146

8.1 INTRODUCTION 147
8.2 HEALTHCARE PROVIDERS 147
8.2.1 HOSPITALS & CLINICS 149
8.2.1.1 Mitigation of denial claims loss to boost demand 149
8.2.2 AMBULATORY SURGERY CENTERS 150
8.2.2.1 Rising trend toward outpatient care facilities to drive market 150
8.2.3 OTHER HEALTHCARE PROVIDERS 151
8.3 HEALTHCARE PAYERS 152
8.3.1 PRIVATE PAYERS 154
8.3.1.1 Fraud prevention and improvements in traceability to fuel uptake 154
8.3.2 PUBLIC PAYERS 155
8.3.2.1 Mandatory EDI compliance for healthcare data processing to propel market 155
8.4 MEDICAL DEVICE COMPANIES 156
8.4.1 TECHNOLOGICAL INNOVATION AND SEAMLESS DEVICE PROCUREMENT REQUIREMENTS TO DRIVE MARKET 156
8.5 PHARMACEUTICAL & BIOTECHNOLOGY COMPANIES 157
8.5.1 AUTOMATION OF SUPPLY CHAIN PROCESSES TO BOOST DEMAND 157
8.6 PHARMACIES 158
8.6.1 RETAIL PHARMACY EXPANSION TO SUPPORT MARKET GROWTH 158
9 HEALTHCARE EDI MARKET, BY REGION 160
9.1 INTRODUCTION 161
9.2 NORTH AMERICA 161
9.2.1 MACROECONOMIC OUTLOOK FOR NORTH AMERICA 167
9.2.2 US 167
9.2.2.1 Increasing investments in rural healthcare to encourage growth 167
?
9.2.3 CANADA 172
9.2.3.1 Rising investments in preventive and social care to facilitate growth 172
9.3 EUROPE 176
9.3.1 MACROECONOMIC OUTLOOK FOR EUROPE 181
9.3.2 GERMANY 181
9.3.2.1 Favorable government initiatives to promote growth 181
9.3.3 UK 186
9.3.3.1 Growing digitization of healthcare infrastructure to drive market 186
9.3.4 FRANCE 190
9.3.4.1 Growing modernization efforts in healthcare to boost market 190
9.3.5 ITALY 195
9.3.5.1 Increasing focus on optimizing healthcare resources to accelerate growth 195
9.3.6 SPAIN 199
9.3.6.1 Universal public healthcare system to sustain growth 199
9.3.7 REST OF EUROPE 203
9.4 ASIA PACIFIC 208
9.4.1 MACROECONOMIC OUTLOOK FOR ASIA PACIFIC 214
9.4.2 JAPAN 214
9.4.2.1 Innovations in digital health solutions to propel market 214
9.4.3 CHINA 219
9.4.3.1 High uptake of digitization and policy-driven expansion of health services to drive market 219
9.4.4 INDIA 223

9.4.4.1 Growing adoption of EHR solutions to fuel uptake 223
9.4.5 REST OF ASIA PACIFIC 227
9.5 LATIN AMERICA 232
9.5.1 MACROECONOMIC OUTLOOK FOR LATIN AMERICA 237
9.5.2 BRAZIL 237
9.5.2.1 Improvements in hospital management systems to drive market 237
9.5.3 MEXICO 242
9.5.3.1 Budgetary cuts and shortage of healthcare professionals to restrain market 242
9.5.4 REST OF LATIN AMERICA 246
9.6 MIDDLE EAST & AFRICA 251
9.6.1 MACROECONOMIC OUTLOOK FOR MIDDLE EAST & AFRICA 256
9.6.2 GCC COUNTRIES 256
9.6.2.1 Rising healthcare investments for supply management to fuel uptake 256
9.6.3 REST OF MIDDLE EAST & AFRICA 261
?
10 COMPETITIVE LANDSCAPE 266
10.1 INTRODUCTION 266
10.2 KEY PLAYER STRATEGY/RIGHT TO WIN 266
10.2.1 OVERVIEW OF STRATEGIES ADOPTED BY PLAYERS IN HEALTHCARE EDI MARKET 266
10.3 REVENUE ANALYSIS, 2019-2023 268
10.4 MARKET SHARE ANALYSIS, 2023 269
10.4.1 SOFTWARE PROVIDERS 269
10.4.1.1 Ranking of key market players 270
10.4.2 SERVICE PROVIDERS 271
10.4.2.1 Ranking of key market players 272
10.5 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023 273
10.5.1 STARS 273
10.5.2 EMERGING LEADERS 273
10.5.3 PERVASIVE PLAYERS 274
10.5.4 PARTICIPANTS 274
10.5.5 COMPANY FOOTPRINT: KEY PLAYERS, 2023 275
10.5.5.1 Company footprint 275
10.5.5.2 Component footprint 276
10.5.5.3 Transmission type footprint 277
10.5.5.4 End-user footprint 278
10.5.5.5 Region footprint 279
10.6 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023 280
10.6.1 PROGRESSIVE COMPANIES 280
10.6.2 RESPONSIVE COMPANIES 280
10.6.3 DYNAMIC COMPANIES 280
10.6.4 STARTING BLOCKS 280
10.6.5 COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2023 282
10.7 COMPANY VALUATION & FINANCIAL METRICS 283
10.7.1 FINANCIAL METRICS 283
10.7.2 COMPANY VALUATION 283
10.8 BRAND/PRODUCT COMPARISON 284
10.9 COMPETITIVE SCENARIO 285

10.9.1 PRODUCT/SERVICE LAUNCHES & ENHANCEMENTS 285
10.9.2 DEALS 286
10.9.3 OTHER DEVELOPMENTS 287
?
11 COMPANY PROFILES 288
11.1 KEY PLAYERS 288
11.1.1 MCKESSON CORPORATION 288
11.1.1.1 Business overview 288
11.1.1.2 Products/Services offered 289
11.1.1.2.1 Deals 290
11.1.1.2.2 Other developments 291
11.1.1.3 MnM view 291
11.1.1.3.1 Key strengths 291
11.1.1.3.2 Strategic choices 291
11.1.1.3.3 Weaknesses & competitive threats 291
11.1.2 UNITEDHEALTH GROUP 292
11.1.2.1 Business overview 292
11.1.2.2 Products/Services offered 293
11.1.2.3 Recent developments 294
11.1.2.3.1 Deals 294
11.1.2.3.2 Other developments 294
11.1.2.4 MnM view 295
11.1.2.4.1 Key strengths 295
11.1.2.4.2 Strategic choices 295
11.1.2.4.3 Weaknesses & competitive threats 295
11.1.3 COGNIZANT 296
11.1.3.1 Business overview 296
11.1.3.2 Products/Services offered 297
11.1.3.3 Recent developments 298
11.1.3.3.1 Deals 298
11.1.3.3.2 Other developments 298
11.1.3.4 MnM view 299
11.1.3.4.1 Key strengths 299
11.1.3.4.2 Strategic choices 299
11.1.3.4.3 Weaknesses & competitive threats 299
11.1.4 IBM 300
11.1.4.1 Business overview 300
11.1.4.2 Products/Services offered 302
11.1.4.3 Recent developments 302
11.1.4.3.1 Product launches 302
11.1.4.3.2 Deals 303
11.1.4.4 MnM view 304
11.1.4.4.1 Key strengths 304
11.1.4.4.2 Strategic choices 304
11.1.4.4.3 Weaknesses & competitive threats 304
?
11.1.5 VERADIGM LLC 305

11.1.5.1 Business overview 305
11.1.5.2 Products/Services offered 306
11.1.5.3 Recent developments 307
11.1.5.3.1 Product launches 307
11.1.5.3.2 Deals 307
11.1.5.3.3 Other developments 307
11.1.6 ATHENAHEALTH, INC. 308
11.1.6.1 Business overview 308
11.1.6.2 Products/Services offered 308
11.1.7 BOOMI, LP 309
11.1.7.1 Business overview 309
11.1.7.2 Products/Services offered 309
11.1.7.3 Recent developments 310
11.1.7.3.1 Product enhancements 310
11.1.7.3.2 Deals 311
11.1.8 EXPERIAN INFORMATION SOLUTIONS, INC. 312
11.1.8.1 Business overview 312
11.1.8.2 Products/Services offered 313
11.1.8.3 Recent developments 314
11.1.8.3.1 Product launches 314
11.1.8.3.2 Deals 315
11.1.8.3.3 Other developments 315
11.1.9 SSI GROUP LLC 316
11.1.9.1 Business overview 316
11.1.9.2 Products/Services offered 317
11.1.9.2.1 Product launches 317
11.1.10 QUADAX, INC. 318
11.1.10.1 Business overview 318
11.1.10.2 Products/Services offered 319
11.1.10.3 Recent developments 319
11.1.10.3.1 Deals 319
11.1.10.3.2 Other developments 320
11.1.11 WAYSTAR 321
11.1.11.1 Business overview 321
11.1.11.2 Products/Services offered 321
11.1.11.3 Recent developments 322
11.1.11.3.1 Product launches 322
11.1.11.3.2 Deals 322
11.1.11.3.3 Other developments 323
?
11.1.12 AVAILITY, LLC 324
11.1.12.1 Business overview 324
11.1.12.2 Products/Services offered 324
11.1.12.3 Recent developments 326
11.1.12.3.1 Product launches 326
11.1.12.3.2 Deals 327
11.1.12.3.3 Other developments 328

11.1.13 COMARCH SA 329
11.1.13.1 Business overview 329
11.1.13.2 Products/Services offered 330
11.1.13.3 Recent developments 331
11.1.13.3.1 Deals 331
11.1.13.3.2 Other developments 331
11.1.14 AXWAY 332
11.1.14.1 Business overview 332
11.1.14.2 Products/Services offered 333
11.1.14.3 Recent developments 334
11.1.14.3.1 Deals 334
11.1.15 PLEXIS HEALTHCARE SYSTEMS 335
11.1.15.1 Business overview 335
11.1.15.2 Products/Services offered 335
11.1.15.3 Recent developments 336
11.1.15.3.1 Other developments 336
11.1.16 TRUE COMMERCE, INC. 337
11.1.16.1 Business overview 337
11.1.16.2 Products/Services offered 337
11.1.16.3 Recent developments 338
11.1.16.3.1 Deals 338
11.1.16.3.2 Expansions 339
11.1.16.3.3 Other developments 339
11.1.17 INOVALON 340
11.1.17.1 Business overview 340
11.1.17.2 Products/Services offered 340
11.1.17.3 Recent developments 341
11.1.17.3.1 Product enhancements 341
11.1.17.3.2 Deals 341
11.1.17.3.3 Other developments 342
11.1.18 123 EDI 343
11.1.18.1 Business overview 343
11.1.18.2 Products/Services offered 343
?
11.1.19 NTT DATA GROUP CORPORATION 344
11.1.19.1 Business overview 344
11.1.19.2 Products/Services offered 345
11.1.19.3 Recent developments 346
11.1.19.3.1 Deals 346
11.1.20 CIRIUS GROUP, INC. 347
11.1.20.1 Business overview 347
11.1.20.2 Products/Services offered 347
11.1.21 EPICOR SOFTWARE CORPORATION 348
11.1.21.1 Business overview 348
11.1.21.2 Products/Services offered 348
11.1.21.3 Recent developments 350
11.1.21.3.1 Deals 350

11.2 OTHER PLAYERS 351
11.2.1 OSP LABS 351
11.2.2 NALASHAA 352
11.2.3 WNS 353
11.2.4 PILOTFISH, INC. 354
11.2.5 CLEO 355
12 APPENDIX 356
12.1 DISCUSSION GUIDE 356
12.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL 363
12.3 CUSTOMIZATION OPTIONS 365
12.4 RELATED REPORTS 366
12.5 AUTHOR DETAILS 367

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