Point-of-Care Data Management Software - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Point-of-Care Data Management Software Market is expected to register a CAGR of 12.3% during the forecast period.

Key Highlights
- The demand for point-of-care testing is growing in response to the value shift in healthcare and technological developments. Several factors are driving the need for POCT. Some of them include an increase in infectious diseases, a rise in lifestyle-related diseases, such as cardiac diseases and diabetes, a growing patient desire to use home-based POC devices, and technological advancements creating faster and easier-to-use devices.
- Around the globe, an estimated 511 million adults have diabetes. By 2040, this number is expected to rise to over 5,70 million. As diabetes worldwide continues to increase, so must the effort to raise awareness. 37% of all diabetic adults are expected to live in the Asia-Pacific region. Additionally, according to the International Diabetes Federation, the number of diabetic patients worldwide in 2021 was 537 million. Between 2021 - 2045, the global expenditures for diabetes treatment are anticipated to grow from USD 966 million to USD 1,053 million. According to a recent report by the Centers for Disease Control and Prevention (CDC), more than 50% of people with diabetes who have been diagnosed with COVID-19 are hospitalized.
- Rapid diagnosis of clinical conditions through point-of-care testing (POCT) can improve patient outcomes. The primary concept behind POCT growth is that bringing testing closer to the patient and results quickly and conveniently to the provider can speed up the diagnosis and treatment. Today's POCT devices are changing, but capturing the data required to document compliance is still time-consuming. A robust POCT management system and connectivity solution reduces the time spent manually typing in results, eliminates errors inherent to manually entered results, and facilitates real-time access to results so that providers can make timely decisions.
- Additionally, as healthcare data analytics are more commonly used to support patient-centered care and population health management, it is essential to have POCT results electronically integrated to include results tracking metrics and key performance

indicators. Electronic medical records (EHR) expenditures in the United States grew at an annual average of 5.4% from 2015 to 2019, totaling USD 14.5 billion in 2019. Additionally, according to the Japanese Nursing Association survey, from September to October 2019, around 63% of the hospitals in Japan implemented the system of EMR. The government in the country has been promoting the system's use since the beginning of the 2000s.
- The COVID-19 outbreak placed a significant burden on healthcare systems worldwide that are straining to handle the volume of ill patients requiring life-saving treatment. Several countries have witnessed or are preparing for shortages of critical medical equipment such as surgical masks, face shields, life-saving ventilators, or even the physical space and beds for patients. These seemingly fundamental necessities become the priority in a world of increasingly high-tech healthcare equipment.

Point-of-Care (POC) Data Management Software Market Trends

Hospitals/Critical Care Units Segment is Expected to Hold a Significant market Share

- The point-of-care testing (POCT) and electronic medical records system usage are rising in hospitals, where the importance of real-time electronic reporting of results is increasing. POCT data management systems are evolving to meet the marketplace's changing needs in supporting such a model. Across the hospitals, either from campus to campus or from one state/province to another, the web-based connectivity data management platform unlocks primary efficiency in point-of-care testing program management.
- The most critical aspect of POC (point-of-care) technology is its presence at the bedside. POC technologies facilitate and improve interactions between patients and their nurses, doctors, and surgeons, leading to better healthcare outcomes. Bedside glucose testing is the most widespread and occupies the most massive volume in the POC market. These were the first devices developed and involved hundreds of devices and thousands of operators.
- Further, a wall-mounted POC terminal in every room/treatment area or workstation on wheels has the potential to create significant time and cost savings in any hospital. Various studies concluded that nurses spend 25-50% of their shifts on documentation done in the traditional manner, which is on a physical chart with a pencil and paper. This means that nurses are regularly involved in accurate retrieval, production, modification, and critical patient data storage.
- Further, clinicians in intensive care units (ICU)/critical care units often work with critically ill patients in limited space and must make quick decisions at that point of care. Thus, critical care units have increasingly used POCT as a routine element of patient management, notably for blood gas analysis. The primary objective of the blood gas analyzer (BGA) is to deliver accurate measures of the blood gas levels (such as pH, pO2, and pCO2); however, modern analyzers can currently measure additional parameters in the same blood sample, such as the hemoglobin or electrolyte concentrations (includes sodium, potassium, chloride, and ionized calcium).
- The development of SmartICU at a hospital in Spain, in partnership with NTT DATA (an NTT DATAzGroup), is teaming its doctors and technologists with NTT DATA's data scientists to get better clinical results. At the outset of a one-year journey of developing the SmartICU solution with the hospital, the team identified data management and reporting as the primary obstacle.
- Data sources at the critical units go far beyond high-level device readings when one considers them unstructured, such as the nurse's hourly measurements manually. The teams spent a certain amount of time on data discovery, integration, reporting dashboard designing, and customizing. With this foundation, the hospital and NTT DATA teams have focused on the most value-adding analytic scenarios to layer on top.

North America is Expected to Hold a Significant Market Share

- Point-of-care testing (POCT) has been used in the North American region for several decades to diagnose and monitor acute and

chronic medical conditions. The growing availability of rapid tests for diagnosing infectious diseases, such as HIV, TB, or malaria, that primarily enable physicians and patients to visualize the results from a smartphone and make appropriate clinical decisions may transform the market over the next few years. The point-of-care diagnostics market is also driven by the latest innovations in the diagnostics industry to provide an expedited diagnosis for quick clinical decision-making to support treatment regimens.
- According to the Centers for Disease Control and Prevention, chronic lower respiratory diseases, including COPD and asthma, are the fourth-leading causes of mortality in the United States. They are responsible for more than 160,000 deaths a year. It is expected that 1 in 5 COPD patients will be readmitted within 30 days in the United States.
- There is a preference for POC adoption by governments. POC testing reduces the strain on hospital resources, as well as ER wait times and visits. The majority of POC tests produced are designed for detecting infectious diseases. For instance, the Point of Care Technologies Research Network established by the United States National Institute of Biomedical Imaging and Bioengineering accelerates POC diagnostics or testing product development. Favorable regulations, such as the Clinical Laboratory Improvement Amendments (CLIA) guidelines, promote POC testing over other forms.
- Presently, US POC testing caches comprise chemistry/electrolytes, pregnancy, hemoglobin, cardiac biomarkers, hematology, fecal occult blood, drugs of abuse, liver function, blood gases, and limited infectious diseases. Owing to the deficiencies with existing POC tests for cardiac biomarkers, MEDITECH's Expanse Point of Care software, the company's latest web-based mobile technology for nurses and therapists to provide the best and most efficient patient-facing care, has been implemented at King's Daughters Medical Center, aiming to eliminate infectious diseases. Depending on geographic location and potential infectious diseases, POC resources can be customized for pandemics, complex emergencies, or disasters.
- As the healthcare community scrambles for accurate, timely, and virtual strategies to improve patient care, especially amid the COVID -19 pandemic, Evoke360 not only enhances the quality of care and patient outcomes but also impacts quality and risk adjustment scores that increase profit margins and give provider organizations a competitive edge. In June 2020, DataLink Software (DataLink) pointed to the key advantages of Evoke360 and its Provider Relations Management (PRM) module, enabling providers to transition from fee-for-service to value-based care. Evoke360 serves as a point-of-care solution, aggregating data from disparate sources to accelerate preemptive patient care, closing gaps in care to treat more than the diagnosis results.

Point-of-Care (POC) Data Management Software Industry Overview

The Point-of-Care Data Management Software Market is highly competitive, owing to the presence of multiple players in the market. The market appears to be moderately fragmented, with the key players adopting strategies such as product innovation, mergers, and acquisitions, to expand their reach and stay competitive in the market. Some of the market's major players are Siemens Healthineers AG, Abbott Point of Care Inc., and Danaher Corporation, among others.

- In January 2022, Glytec and Roche struck a partnership on insulin management. This digital health collaboration combines Roche's expertise in medical devices and IT solutions with Glytec's FDA-cleared insulin dosing decision support software, Glucommander, to address the challenges with inpatient blood sugar management at the hospital bedside, designed to improve patient safety and care by empowering point-of-care clinicians to collect and take immediate action on glycaemic management data.
- In February 2022, Butterfly Network, Inc., a digital health company transforming care with handheld, whole-body ultrasound, and Ambra Health, an Intelerad Company and maker of a leading cloud-based medical image management suite, announced a partnership to accelerate and simplify interoperability for bedside imaging data. This partnership strengthens Butterfly Blueprint's enterprise platform's scalability and will enhance access and shareability of valuable ultrasound information across hospitals and health systems.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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