

Electronic Medical Records - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Electronic Medical Records Market Analysis

The electronic medical records market is expected to grow from USD 34.50 billion in 2025 to USD 36.24 billion in 2026 and is forecast to reach USD 46.34 billion by 2031 at 5.04% CAGR over 2026-2031. Several forces keep growth on track: modern reimbursement rules reward data-driven care; hospitals and clinics replace first-generation systems to gain AI-ready functionality; and payers increasingly require interoperable records for prior-authorization decisions. Rising investment in cloud infrastructure allows providers to trim IT overhead while expanding access for multidisciplinary teams. At the same time, mounting use-case evidence shows that well-implemented EMRs lower medication errors, shorten length of stay, and improve revenue?cycle performance, pushing laggards to accelerate adoption. Taken together, these trends position the electronic medical records market as a foundational pillar of broader digital-health transformation.

Global Electronic Medical Records Market Trends and Insights

AI-Powered Clinical Decision Support Enhancing EMR Value Proposition

Health-system executives rank artificial intelligence among their top investment targets because embedded algorithms turn passive records into active clinical partners. The U.S. Food and Drug Administration has already cleared more than 1,000 AI-enabled devices that integrate directly with EMR workflows, ranging from arrhythmia detection to automated image labeling. Mount Sinai's GLUCOSE model, for instance, cut insulin-dosing errors in ICU trials by outperforming experienced clinicians and is

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

built for seamless record integration. Oracle Health's next-generation cloud EHR, scheduled for broad release in 2025, embeds conversational AI to reduce documentation time and flag guideline deviations in real time. As accuracy rates climb and regulatory comfort grows, AI turns EMRs into proactive decision-support platforms, enlarging their clinical and commercial appeal.

Regulatory Financial Incentives Driving Digital Record Adoption

Government subsidies remain a catalyst for EMR rollouts. In the United States, the 2025 Promoting Interoperability Program continues to tie Medicare reimbursement to certified technology use, pushing providers toward comprehensive data capture and exchange. In Europe, the European Health Data Space (EHDS) takes effect in 2025, creating a unified framework for secondary data use that rewards hospitals holding standardized electronic files. Similar incentive schemes in Japan and Australia reimburse facilities that meet national interoperability benchmarks, closing the funding gap for smaller hospitals. As pay-for-performance models proliferate, decision makers view EMRs as revenue protection tools rather than compliance checkboxes. The resulting budget allocations underpin steady expansion of the electronic medical records market across mature and emerging economies.

Cyber-Security Liability Exposure & Insurance Costs

Healthcare remains the most-targeted industry for ransomware, logging 1,710 security incidents in 2025 alone. Breached records expose providers to regulatory fines, class-action litigation, and rising cyber-insurance premiums that now eclipse USD 8 million annually for large systems. A high-profile breach at a major cloud vendor in early 2025 intensified scrutiny of supply-chain risk, prompting boards to demand independent penetration testing and round-the-clock monitoring. Rural hospitals are especially vulnerable, with 60% reporting at least one cyber-incident within three years, often while still running outdated record software. These pressures slow procurement cycles, lengthen due diligence, and marginally dampen overall growth in the electronic medical records market.

Other drivers and restraints analyzed in the detailed report include:

Migration from Legacy Client-Server to Cloud-Native Platforms Reducing Total Cost of Ownership
Patient-Centric Interoperability Mandates Catalyzing Vendor Neutrality
Physician Burnout Linked to Poor User Interface Design

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The electronic medical records market share for software was 54.22% of total revenue in 2025, because advanced charting engines, analytics dashboards, and embedded AI modules remain critical to clinical value. Implementation and optimization services, however, now log the fastest trajectory at a 6.22% CAGR through 2031. Health systems that rushed rollouts during the pandemic report success rates below 40%, prompting fresh spending on workflow redesign, data conversion, and user training. Consultancy teams conversant with both HL7 standards and bedside routines command premium rates, underpinning the services boom. Meanwhile, lower hardware demand accompanies the shift to browser-based clients, trimming on-premise server budgets but not eliminating niche device opportunities such as medical-grade tablets.

Service expansion also mirrors new reimbursement realities. Value-based payment contracts penalize readmissions and adverse events, so providers hire engineers to tune clinical decision-support rules and audit data quality continuously. This post-go-live optimization translates into sticky annuity revenue for integrators and fuels the services slice of the electronic medical records market. Several leading hospital chains now embed outcome-based incentives in their vendor agreements, further entrenching the expertise of external partners.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

General EMRs held 59.55% of the electronic medical records market share in 2025, mainly because multi-specialty hospitals seek a single source of truth for enterprise reporting. These systems bundle inpatient, outpatient, and billing workflows, simplifying audit trails. Yet orthopedics, oncology, and fertility clinics increasingly view mono-lithic designs as burdensome, stoking 6.49% CAGR growth in niche solutions built around specialty templates. Vendors catering to subspecialties embed disease-specific order sets and integrate diagnostic devices natively, reducing clicks for clinicians.

Adoption momentum is strongest in ambulatory networks where one dominant specialty drives revenue. Neurology groups deploying seizure-tracking dashboards and tele-EEG streaming inside lightweight specialty EMRs report 15% faster documentation and higher patient satisfaction. To stay competitive, enterprise vendors have begun releasing modular micro-apps that slot specialty features into the core database, blurring lines between categories and preserving data continuity across service lines. This hybrid approach is expected to recalibrate the electronic medical records market size over the next five years.

The Electronic Medical Records Market Report is Segmented by Component (Hardware, Software, Services), EMR Type (General EMRs, Specialty-Specific EMRs), Mode of Delivery (Cloud-Based, On-Premise), Application (Cardiology, Neurology, and More), End-User (Hospital-Based EMR, Specialty Clinics, and More), and Geography (North America, Europe, Asia-Pacific, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America commanded 43.30% of electronic medical records market revenue in 2025. Federal stimulus programs after the HITECH Act established near-universal hospital adoption, leaving current growth to focus on system replacement and optimization. Interoperability certification deadlines keep spending buoyant, but the region's 4.25% CAGR to 2031 trails all others. Provider M&A activity consolidates purchasing decisions, strengthening the bargaining power of top vendors and accelerating platform standardization.

Asia-Pacific, by contrast, will compound at 6.99% CAGR, the fastest worldwide. Health ministries in China, India, and Japan subsidize cloud pilots that leapfrog client-server generations, helping rural facilities connect to specialists via telehealth. Mobile-first designs proliferate, aligning with clinicians' smartphone habits. The associated demand for data centers and cybersecurity services feeds local IT ecosystems, reinforcing the self-sustaining cycle that underpins the electronic medical records market in the region.

Europe shows steady 4.82% CAGR as the EHDS initiative harmonizes record architectures across member states, balancing innovation with stringent GDPR safeguards. National programs in Germany and the Nordics that reimburse AI-supported diagnostics provide incremental tailwinds. Latin America grows 6.36% CAGR, led by Brazil's national digital-health plan and Argentina's private-sector oncology networks. The Middle East & Africa follow closely, with Gulf Cooperation Council hospitals adopting U.S. vendor platforms under joint-venture arrangements.

List of Companies Covered in this Report:

AdvancedMD Altera Digital Health Athenahealth Cantata Health LLC CareCloud DrChrono Inc. eClinicalWorks Epic Systems GE HealthCare Technologies Inc. Greenway Health Intersystems Kareo Inc. McKesson Medhost Inc. Meditech Medsphere Systems NextGen Healthcare Oracle TruBridge, Inc. Veradigm Inc.

Additional Benefits:

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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

1 Introduction

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 AI-Powered Clinical Decision Support Enhancing EMR Value Proposition

4.2.2 Regulatory Financial Incentives Driving Digital Record Adoption

4.2.3 Migration from Legacy Client-Server to Cloud-Native Platforms Reducing Total Cost of Ownership

4.2.4 Patient-Centric Interoperability Mandates Catalyzing Vendor Neutrality

4.2.5 Integrated Telehealth-EMR Workflows Improving Provider Productivity

4.2.6 Chronic Disease Management Programs Requiring Longitudinal Data Continuity

4.3 Market Restraints

4.3.1 Cyber-Security Liability Exposure & Insurance Costs

4.3.2 Physician Burnout Linked to Poor User Interface Design

4.3.3 Capital Budget Constraints in Small & Mid-Size Provider Organizations

4.3.4 Data Governance Complexity in Multi-Vendor Ecosystems

4.4 Technological Outlook

4.5 Regulatory Outlook

4.6 Porter's Five Forces

4.6.1 Bargaining Power of Suppliers

4.6.2 Bargaining Power of Buyers/Consumers

4.6.3 Threat of New Entrants

4.6.4 Threat of Substitute Products

4.6.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value)

5.1 By Component

5.1.1 Hardware

5.1.2 Software

5.1.3 Services

5.2 By EMR Type

5.2.1 General EMRs

5.2.2 Specialty-Specific EMRs

5.3 By Mode of Delivery

5.3.1 Cloud-based

5.3.2 On-premise

5.4 By Application

5.4.1 Cardiology

5.4.2 Neurology

5.4.3 Radiology

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.4.4 Oncology
- 5.4.5 Emergency & Trauma
- 5.4.6 Obstetrics & Gynecology
- 5.4.7 Other Applications
- 5.5 By End-User
 - 5.5.1 Hospital-based EMR
 - 5.5.2 Physician/Ambulatory Care Centers
 - 5.5.3 Specialty Clinics
 - 5.5.4 Diagnostic & Imaging Centers
 - 5.5.5 Other End Users
- 5.6 By Geography (Value)
 - 5.6.1 North America
 - 5.6.1.1 United States
 - 5.6.1.2 Canada
 - 5.6.1.3 Mexico
 - 5.6.2 Europe
 - 5.6.2.1 Germany
 - 5.6.2.2 United Kingdom
 - 5.6.2.3 France
 - 5.6.2.4 Italy
 - 5.6.2.5 Spain
 - 5.6.2.6 Rest of Europe
 - 5.6.3 Asia-Pacific
 - 5.6.3.1 China
 - 5.6.3.2 India
 - 5.6.3.3 Japan
 - 5.6.3.4 Australia
 - 5.6.3.5 South Korea
 - 5.6.3.6 Rest of Asia-Pacific
 - 5.6.4 Middle East & Africa
 - 5.6.4.1 GCC
 - 5.6.4.2 South Africa
 - 5.6.4.3 Rest of Middle East & Africa
 - 5.6.5 South America
 - 5.6.5.1 Brazil
 - 5.6.5.2 Argentina
 - 5.6.5.3 Rest of South America

6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Business Model Analysis
- 6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and analysis of Recent Developments)

- 6.4.1 AdvancedMD Inc.
- 6.4.2 Altera Digital Health
- 6.4.3 Athenahealth Inc.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.4 Cantata Health LLC
- 6.4.5 CareCloud Inc.
- 6.4.6 DrChrono Inc.
- 6.4.7 eClinicalWorks
- 6.4.8 Epic Systems Corporation
- 6.4.9 GE HealthCare Technologies Inc.
- 6.4.10 Greenway Health LLC
- 6.4.11 InterSystems Corporation
- 6.4.12 Kareo Inc.
- 6.4.13 McKesson Corporation
- 6.4.14 Medhost Inc.
- 6.4.15 MEDITECH
- 6.4.16 Medsphere Systems Corporation
- 6.4.17 NextGen Healthcare Inc.
- 6.4.18 Oracle Corporation
- 6.4.19 TruBridge, Inc.
- 6.4.20 Veradigm Inc.

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Electronic Medical Records - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com