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Software providers in the outpatient healthcare market

Development since 2016

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Key Highlights

Willingness to change
Compared to the inpatient sector, there is a significantly higher willingness to change systems in the outpatient sector.

Dynamic growth
Despite a decline in the number of medical practices, the top five providers are growing by up to 90% annually.

Psychotherapy market growing
The number of psychotherapy practices rose by over 50% between 2013 and 2022. Specialised software providers Epikur and Hasomed are benefiting particularly from this.

Established solutions under pressure
While the market is growing, established providers are losing ground: CompuGroup and medatixx recorded declines of 21.9% and 8%, respectively, in the period under review.

Specialized providers on the road to success
Specialized systems such as Medavis (radiology) and FIDUS (ophthalmology) are growing strongly – despite high barriers to change due to complex integrations.

Acquisitions drive software change
The increasing sale of practices, whether to individuals or groups, is leading to more changes in practice management software.

Consolidation activities among practice networks
In industries with intensive takeover activity, the leading providers are benefiting particularly from market concentration.

Ranking of providers (1/4)

#	Company	Installations 2016	Installations 2022	CAGR	Trend
1	T2MED	43	1,951	**88.9%**	↑
2	RED	76	551	**39.1%**	↑
3	zollsoft	371	2,163	**34.2%**	↑
4	INDAMED the MEDICAL OFFICE company	1,832	5,107	**18.6%**	↑
5	EPIKUR	2,265	4,894	**13.7%**	↑
6	gradient. an IQVIA business	499	1,005	**12.4%**	↑
7	nmc new media company	2,916	4,266	**6.5%**	↑
8	medavis	172	229	**4.9%**	→
9	HASOMED® Praxis. Therapie. Sicherheit.	8,666	10,999	**4.1%**	→
10	RescuePro 3000®	148	173	**2.6%**	→

Ranking of providers (2/4)

#	Company	Installations 2016	Installations 2022	CAGR	Trend
11	PegaMed	819	947	**2.4%**	→
12	T Healthcare Solutions	900	1,030	**2.3%**	→
13	FIDUS	472	515	**1.5%**	→
14	psyprax	10,328	10,974	**1.0%**	→
15	EVIDENT Software für 18 ... 48	688	730	**1.0%**	→
16	Meierhofer	280	296	**0.9%**	→
17	duria	1,915	1,951	**0.3%**	→
18	KIND	221	224	**0.2%**	→
19	SAP	1,434	1,436	**0.0%**	→
20	SOFTLAND	1,653	1,650	**0.0%**	→

Ranking of providers (3/4)

#	Company	Installations 2016	Installations 2022	CAGR	Trend
21	medisoftware	726	706	**-0.5%**	→
22	DAMPSOFT	81	78	**-0.6%**	→
23	medVISION Medical Software Solutions	409	390	**-0.8%**	→
24	Data-AL	1,028	954	**-1.2%**	→
25	medatix	19,831	18,248	**-1.4%**	→
26	KfH	255	228	**-1.8%**	→
27	abasoft Praxissoftware für Arztpraxen und MVZ	555	489	**-2.1%**	↓
28	nexus / ag	1,246	1,087	**-2.2%**	↓
29	ergosoft®	2,080	1,796	**-2.4%**	↓
30	bender gruppe medigration	82	70	**-2.6%**	↓

Ranking of providers (4/4)

#	Company	Installations 2016	Installations 2022	CAGR	Trend
31	FREY	5,720	4,664	**-3.3%**	↓
32	MEDYS GmbH	876	698	**-3.7%**	↓
33	CGM CompuGroup Medical	38,474	30,037	**-4.0%**	↓
34	O-MED	232	181	**-4.1%**	↓
35	PRO MEDISOFT	790	559	**-5.6%**	↓
36		106	75	**-5.6%**	↓
37	MED7 von Ärzten für Ärzte	1,039	675	**-6.9%**	↓
38	APW PRAXISSOFTWARE VOM ARZT FÜR ÄRZTE	545	247	**-12.4%**	↓
39	Cerner	1,602	175	**-30.9%**	↓

**Nexus Gruppe (Nexus AG, NEXUS Digital Pathology GmbH, Nexus / Chili GmbH, Nexus Swisslab GmbH, ifa Systems AG)*
**Frey Gruppe (Frey ADV GmbH, InterData Praxis-Computer GmbH, S3 Praxiscomputer GmbH)*
**CompuGroup (Z1, MEDISTAR, TURBOMED, ALBIS, CGM M1 PRO, DATA VITAL, CGM SOUL)*
For better comparability, the installations of the groups as they exist in 2023 were also totalled for the year 2016.

References and Senior Team

CARASENT acquired Data-AL	i-SOLUTIONS HEALTH sold to TRILL IMPACT	IntiQuan sold to PLG ProductLifeGroup	mra sold to GeBBS HEALTHCARE SOLUTIONS *a portfolio company of ChrysCapital*
Healthcare software	Healthcare software	Pharmacometrics	Healthcare technology services
MLD MEDIZINISCHE LABORATORIEN DÜSSELDORF sold to SONIC HEALTHCARE	eci acquired 4ways tele-diagnostics, your way	inspired HEALTH sold to westMONROE	RESERVOIR COMMUNICATIONS GROUP MBO sponsored by PERISCOPE EQUITY
Healthcare services	Tele-diagnostics company	Life sciences market insights and strategy	Healthcare consulting & strategic communications

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