

# The US Diabetic Devices Industry Outlook to 2018 - Growth to be Led by Next Generation Technology

<https://marketpublishers.com/r/UED9FBAF639EN.html>

Date: January 2014

Pages: 83

Price: US\$ 850.00 (Single User License)

ID: UED9FBAF639EN

## Abstracts

The report titled “The US Diabetic Devices Industry Outlook to 2018- Growth to be Led by Next Generation Technology” presents a comprehensive analysis of the industry covering aspects including market size of SMBG devices, CGM systems and Insulin Delivery Devices market by revenue and market segmentation by product categories in SMBG devices and Insulin Delivery Devices market. The report also entails a detailed description on the recent trends and developments in the diabetic care devices market and competitive scenario of major players in the industry along with market share of major companies in SMBG devices and Insulin Delivery devices market.

The Diabetic Care Devices Market in the US has transformed from niche to mainstream, owing to the increasing number of diabetic patients and growing ageing population in the country. Diabetic equipments have slowly become an integral part of present day’s fast paced lifestyles along with other changes such as increasing acceptability and affordability of these products. New product launches in this market has been driven by escalating demand of diabetic care devices by the diabetic population of the country. The US diabetic devices industry grew from USD ~ million in 2007 to USD ~ million in 2013, recording a CAGR of 7.7% from 2007-2013. This market is dominated by players such as Roche Diagnostics, Life Scan and Abbott Diabetes Care.

The US Diabetic Care devices market has been predominantly held by SMBG devices, marking a contribution of nearly ~ % as recorded in 2013. The market share of this segment has decreased significantly from ~% in 2010 to ~% in 2013 but the segment continues to hold the largest share in the diabetic care devices market revenue in the country. The insulin delivery devices accounted for approximately ~ % of the diabetic care devices revenue in the country in the year 2013. CGM devices were introduced in the market in 1999. The US is a leading player in the CGM market in terms of revenue

generation. This market segment made a petite contribution of ~% to the total revenue of diabetic care devices industry in the year 2013.

The use of SMBG has been advocated for several years as an approach to improve blood glucose control for people suffering from Type I and Type II diabetes. Blood glucose meters, blood glucose test strips and lancets and lancing devices constitute the SMBG devices market. The market was valued at USD ~ million in 2007; having grown to USD ~ million in 2013 at a CAGR of ~% during the period of 2007-2013. The market is expected to reach USD ~ million by 2018. Roche Diagnostics and LifeScan occupied the largest share in the SMBG market in 2013. The SMBG devices market will benefit from the appearance and growing attractiveness of CGM.

CGM System offers regular glucose measurements, usually every few minutes. This is a highly useful device as it provides greater insight into blood glucose levels all day by instilling a small sensor under the skin. In the forthcoming years, it is expected that such implantable sensors might robotically adjust for infusion rates provided by the insulin pump. The industry reached USD ~ million in 2013 from USD ~ million in 2010, showing a phenomenal growth, recording an impressive CAGR of ~% during the period 2010-2013. Medtronic and Dexcom are leading players in the industry. Artificial Pancreas, a combination of CGM Device and Insulin Delivery Device, cannot be defined as a cure for diabetes but certainly helps in enhanced control and management of the disease by trimming down the burden of monitoring and managing blood glucose.

The insulin delivery market occupied ~% market share which makes it the second largest segment of the US Diabetic devices market in the year 2013. The market reported value sales of USD ~ million in 2013. The market for diabetic care has been dominated by insulin pens. The share of insulin syringe has declined over the years due to the launch of potential diabetic device substitutes such as insulin pens and artificial pancreas. The insulin pump market generated USD ~ million in 2013. Its contribution in insulin delivery market segment has surged from ~% in 2007 to ~ % in 2013. Medtronic, Novo Nordisk and Sanofi are leading players in the insulin delivery devices market. The market is expected to grow at a CAGR of ~% in the coming years, 2013-2018 with the market size reaching USD ~ million in 2018 from USD ~ million in 2014.

## **KEY TOPICS COVERED IN THE REPORT**

Market Size of the US Diabetic Care Devices Market Size by Revenue,  
2007-2013

Market Segmentation of the US Diabetic Devices by SMBG Devices, CGM Systems and Insulin Delivery Devices, 2010-2013

Market Segmentation of SMBG Devices by Blood Glucose Meters, Blood Glucose Test Strips and Lancets and Lancing Devices, 2007-2013

Market Segmentation of Insulin Delivery Devices by Insulin Syringe, Insulin Pen and Insulin Pump, 2007-2013

Market Size of the US CGM Devices Market by Revenue, 2010-2013

Market share of Major players in the US CGM Devices Market

Market Share of Major Players in sub segments of SMBG Devices Market and Insulin Delivery Devices.

Trends and Developments in the US Diabetic Care Devices Market

Future Outlook and Projections of SMBG Devices, CGM Systems and Insulin Delivery Devices, 2014-2018

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