

Blood Glucose Monitoring Consumables Market - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Blood Monitoring Consumables Market Report

The global blood glucose monitoring consumables market by revenue is expected to grow at a CAGR of over 13% during the period 2020–2026.

The market has witnessed significant growth due to the growing prevalence of diabetes and the increasing awareness of self-management of diabetes. The prevalence of diabetes worldwide increases at an alarming rate due to changing lifestyles, growing alcohol consumption, and increasing smokers. However, the outbreak of the COVID-19 pandemic and the introduction of advanced test strips and lancets influence the digital diabetes management market's growth. The increased demand for self-care/homecare devices is also contributing to the usage of BGM consumables. With an increase in the sale of blood glucose meters, test strips, and lancets, the market offers tremendous growth opportunities for global, regional, and local vendors. Therefore, many vendors strategically focus on the development and commercial launches for regular blood glucose monitoring, which increases the demand for consumables.

The following factors are likely to contribute to the growth of the blood glucose monitoring consumables market during the forecast period:

COVID-19 Pandemic Increasing Demand for Test Strips & Lancets

Advances in Test Strip & Lancet Technology

High Availability of Generic Test Strips

The study considers the global glucose monitoring consumables market's present scenario and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Blood Glucose Monitoring Consumables Market Segmentation

The global blood glucose monitoring consumables market research report includes a detailed segmentation by products, end-users, distribution channel, geography. Test strips accounted for over 64% of the global blood glucose monitoring consumables market in 2020. As revenues from test strips are recurring, vendors strategize to maximize sales volume and profit margins by offering innovative products. However, the growing use of self-monitoring blood glucose testing by patients and professionals in several POC testing sites such as emergency care, physician offices, ambulatory settings, and nursing homes increases test strips' consumption. Hospitals across the world have been using test strips for superfast output and nearly accurate results. These factors have increased the demand for test strips in the market.

In 2020, the end-user segment was segmented into individuals, hospitals and clinics, and others. The individuals segment accounted for the highest share of the market with 75%. The individual segment accounts for the highest share due to the wide acceptance of SMBG monitoring devices and consumables such as test strips, lancets, and lancing devices among consumers. The acceptance of these consumables and machines is confined to developed countries and in developing and underdeveloped countries, which has influenced their revenue growth. SMBG and CGM devices use sensors, lancets, lancing devices, and test strips as consumables to measure the blood glucose. The usage of CMBG is higher in developed countries such as the US and UK, France, Spain, Italy, and Germany due to the increased awareness of these devices and reimbursement options.

Online distribution channels are increasing significantly, although retail channels are maintaining their lead. Online purchasing channels expect to grow at a CAGR of over 12% during the forecast period. However, retail stores continue to be preferred for purchasing consumables and BGM devices in low- and middle-income countries. As the older generation patients prefer retail chains to purchase blood glucose consumables, the X generation prefers online channels for consumables due to high smartphone

penetration. With the outbreak of the COVID-19 pandemic, most offline pharmacies were closed, which directly boosted consumables' sales via online channels. Hospital pharmacies, standalone pharmacies, and other retail pharmacies are the primary retail offline mode of distribution. Around 80% of BGM devices & consumables sales occur via retail channels in low- and middle-income countries.

Product

- Test Strips

- Lancets and Lancing Devices

- Sensors

Distribution Channels

- Offline

- Online

End-users

- Hospitals & Clinics

- Individuals

- Others

INSIGHTS BY GEOGRAPHY

In 2020, North America dominated the market due to its developed healthcare infrastructure and increased awareness of diabetics among patients. The usage of CGM sensors, test strips, lancets, and lancing devices is high among patients. The impact of COVID-19 has been increased in the region, with the US accounting for the highest infection rates.

Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

India

Japan

South Korea

Australia

Latin America

Mexico

Brazil

Argentina

Colombia

Middle East & Africa

Saudi Arabia

Turkey

South Africa

Iran

INSIGHTS BY VENDORS

Medtronic, F. Hoffmann-La Roche, LifeScan, Abbott, and Ascensia are the major global players in the blood glucose consumables market. New product approvals/launches coupled with increased R&D activities are the major strategies implemented by vendors to expand presence, enhance market growth, and sustain the market position. Vendors are actively launching innovative devices to penetrate and tap the high growth potential of the market. Vendors are aggressively engaged in R&D activities and plan to launch several innovative products in the coming years. For instance, Abbott, F. Hoffmann-La Roche, Medtronic, Dexcom, LifeScan, and Ascensia Diabetes Care dominate the market due to continuous product innovations and launches. Several companies are developing or commercializing products such as CGM sensors with increased lifespan, advanced test strips, lancets, and lancing devices, respectively, for continuous and self-monitoring blood glucose devices in the market.

Prominent Vendors

Abbott

F. Hoffmann-La Roche

Dexcom

Medtronic

Ascensia Diabetes Care Holding

LifeScan

Other Prominent Vendors

77 Elektronika Kft

ARKRAY

A. Menarini Diagnostics

AgaMatrix

Alliance International

B. Braun Melsungen

Bionime

Bioptik

BioTest Medical

BTNX

EASYMAX

i-SENS

iHealth Lab

MED TRUST

Medisana

Major BioSystem

Sanofi

TaiDoc Technology

Terumo

Trividia Health

HMD

Rossmax International

Bioland Technology

e-Linkcare Meditech

Diagnosis SA

Microlife

Ypsomed

National Diagnostics Products

Norditalia

IME-DC

KEY QUESTIONS ANSWERED

1. What is the expected growth rate of the Global Blood Glucose Monitoring Consumables Market?
2. How big is the blood glucose test strips and lancet market?
3. What is the growth of the European blood glucose monitoring consumables market?
4. Who are the key vendors in the blood glucose consumables market?
5. Which segment accounted for the most significant blood glucose monitoring devices market share in 2020?

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