

Smart Insulin Pens - Market Insights, Competitive Landscape and Market Forecast-2027

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Abstracts

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Smart Insulin Pens market by connectivity type (bluetooth and USB), by distribution channel (hospital & retail pharmacy, diabetic clinics & centers, e-commerce, and others), by geography is expected to grow at a steady cagr forecast till 2027 owing to increased prevalence of diabetes mellitus due to genetic factors, obesity, age, and unhealthy lifestyles and enhanced awareness of self-management of diabetes treatment using the device

Global smart insulin pens market is estimated to grow at a CAGR of 12.59% during the forecast period from 2022 to 2027. The increase in demand for smart insulin pens is primarily attributed to the increase in prevalence of diabetes mellitus due to genetic factor, age, obesity, and unhealthy lifestyle. Furthermore, the enhancing awareness of self-management of diabetes through smart insulin pens and the technological advancements in device like avoiding extra dosages, maintenance of the systematic record of dosages, easy conversion of information of dose regimen & insulin level in computer-based records, adjusting blood glucose levels based on changes in blood sugar levels will drive the market growth of the device. Additionally, the increasing demand and advancements in telemedicine after pandemic across the world are anticipated to bolster the market, thereby contributing to the growth of the smart insulin pens market during the forecast period from 2022-2027.

Smart Insulin Pens Market Dynamics:

The smart insulin pens market is witnessing a growth in product demand owing to various reasons. The increased prevalence of diabetes mellitus worldwide due to

various factors such as, genetic, age, obesity, and unhealthy lifestyles increasing number of geriatric patients, and various government initiations across the world are anticipated to bolster the market.

According to World Health Organization (WHO) 2021, in the year 2019, diabetes was the ninth leading cause of death with an estimated 1.5 million deaths globally, directly caused by diabetes. Diabetes prevalence and mortality has been rising more rapidly in low- and middle-income countries than in high-income countries. WHO also concluded that diabetes is a major cause of blindness, kidney failure, heart attacks, and stroke.

Furthermore, according to International Diabetes Federation, Diabetes Atlas 10th edition report 2021, globally 537 million adults (20-79 years) were living with diabetes in the year 2020-2021. This number is predicted to rise to 643 million by 2030 and 783 million by 2045. As per same source, over three in four adults with diabetes live in low- and middle-income countries and also diabetes was responsible for 6.7 million deaths in 2021. In type 1 diabetes mellitus the body does not produce enough insulin. In this case, insulin is injected externally which can be done by smart insulin pens. Thus, the increasing prevalence of diabetes will increase the demand and awareness of insulin administration by smart insulin pens. Therefore, the market of smart insulin pens will amplify in the forecast period.

Additionally, according to World Obesity, it is estimated that 2.7 billion adults will be overweight, over 1 billion affected by obesity, and 177 million adults severely affected by obesity by 2025 globally. Obesity is one the major risk factor for diabetes. Obesity causes fat cells to release pro-inflammatory chemicals, which can make the body less sensitive to the insulin. Fat cells disrupt the function of insulin responsive cells and their ability to respond to insulin, one of the major cause of diabetes. As the prevalence of obesity is increasing and this may increase the prevalence of diabetes owing to increase in demand of smart insulin pen in the market.

According to data published by WHO in the year 2021, it was estimated that by 2030, one in six people in the world will be aged 60 years or over. The share of the population aged 60 years and over in the year 2020 was 1.4 billion globally. By 2050, the world's population of people aged 60 years and older will double (2.1 billion). The number of persons aged 80 years or older is expected to triple between 2020 and 2050 to reach 426 million. Age is one of the most important risk factors in the development of prediabetes and diabetes. Geriatric population is at major risk of diabetes mellitus as at this age body experience deficiency of insulin secretion and also observe growing insulin resistance caused by a change in body composition and sarcopenia. Thus, the

number of geriatric population is increasing which will in turn will affect the prevalence of diabetic patients. The increased prevalence of diabetes mellitus will bolster the market of smart insulin pens in the forecast period.

Furthermore, in April 2021, WHO launched the Global Diabetes Compact, a global initiative aiming for sustained improvements in diabetes prevention and care, with a particular focus on supporting low- and middle-income countries. In May 2021, the World Health Assembly also agreed on a resolution on strengthening prevention and control of diabetes. WHO is continuously working on creating awareness about prevention, treatment and control of diabetes. This will somehow increase the awareness about diabetes ultimately increasing the demand of smart insulin pens in the market.

Moreover, the product launches in market, in turn, drive the product demand in the market. For instance, in May 2021, Medtronic Plc. announced that it received CE mark for its InPen smart insulin pen for multiple daily injections and its Guardian 4 sensor for better management of diabetes. InPen smart insulin pen is the first-ever smart insulin pen to receive approval in Europe.

Thus, due to the increasing prevalence of diabetes mellitus globally and product launches, will pay way to a rising demand for smart insulin pen, in turn increasing the smart insulin pens market growth.

However, lack of accessibility of device in remote regions and stringent regulatory process may pose as a challenge to the smart insulin pens market growth.

The ongoing COVID-19 pandemic has moderately impacted the market for smart insulin pens as diabetic patient are at greater risk of getting infection by the virus. As, diabetes was one of the key factor which decreases the recovery rate of a patient suffering from the COVID-19. Therefore, there was an increased demand of smart insulin pens. In the initial stages of lockdown and due to stringent rules supply of the devices was halted for some time as the supply of raw materials and other resources was not available. But, with the upturn of resources & raw materials and with masses being vaccinated, the market again picked up the momentum. On the other hand, with the development of telemedicine and e-commerce, pandemic has enhanced the demand of smart insulin pens due to online sales. Many users preferred home delivery of the products like smart insulin pens and other diabetes care products to avoid exposure to the virus. Thus, creating a positive impact in the market.

Smart Insulin Pens Market Segment Analysis:

Smart Insulin Pens Market by Connectivity Type (Bluetooth And USB), by Distribution Channel (Hospital & Retail Pharmacy, Diabetic Clinics & Centers, E- Commerce, And Others), and by Geography (North America, Europe, Asia-Pacific, and Rest of the World)

In the connectivity type segment of the smart insulin pens market, the bluetooth connected smart insulin pens are estimated to hold a significant share in the smart insulin pens market during the forecast period (2022-2027). This can be ascribed to the various advantages that are associated with the device.

The most important benefit of bluetooth smart insulin pen is that it measures and injects the insulin directly to the patient's digital blood glucose through the bluetooth wireless interface. The software records each dose accurately and transfers readings into memory system of the device.

Bluetooth connected smart insulin pen collects insulin-dosing data and transmits it to the application (app) that includes a dose calculator to recommend dosages of a patient. This helps in tracking the dose-administration in the patient. These apps provide patients information regarding glucose history, dose history and various test reports. According to the remaining level of insulin in the body, the smart pen calculate and adjust the dose and then inject it in the body. Adjustment of the dose in the smart insulin pens is also done on the basis of dose history, meal history, and current glucose & insulin level.

In case of USB smart insulin pens, additional accessories like wires or USB will be required to connect the device with the app but this disadvantage is overpowered by bluetooth connected smart insulin pens as these pens are simply connect by bluetooth in the smartphones.

Moreover, smart insulin pen applications are also connected to the physician and doctor helping them to keep an easy track of the insulin level in the patient and the severity of the disease. The device sends real-time data via bluetooth to an app available in smartphones. This feature helps physician to keep a check on insulin level and dose-regimen of a patient.

Additionally, it includes a temperature sensor built into the pen that sets off an app alarm if the pen's temp dips below freezing or above body temperature, ensuring that

the insulin stays intact.

The bluetooth connected smart insulin pens are equipped with additional features such as audible, visual and tactile feedback during dose dialing to support easy application and may reduce the chances of human errors during handling. Moreover, patient can set an alarm to remind him or her regarding dose administration.

Additionally, in various settings bluetooth smart insulin pens may be cost-effective as compared to vials and syringes used in conventional insulin pens or in syringes.

Further, these Bluetooth smart insulin delivery pens are environmentally friendly that could provide ecological advantage in terms of contributing to less plastic waste, compared to conventional insulin administration method.

Other factors like comfort in using the device and ease of transport may also contribute as a factor for higher demand of product in the market. For patients requiring long-term insulin therapy, bluetooth smart insulin pens can be preferred.

Moreover, the product launches, in turn, drive the product demand in the market. For instance, in 2019, Companion Medical, now acquired by Medtronic announced the launch of Bluetooth-enabled InPen which takes away the guesswork from dosing of insulin with an in-app bolus calculator that uses precise carbohydrate ratios and correction factors and calculates the personalized insulin doses.

Thus, owing to the various advantages in the area of bluetooth connected smart insulin pens, there will be an increase in the demand for bluetooth connected insulin pen, which in turn will drive the smart insulin pens market growth.

North America is expected to dominate the overall Smart Insulin Pens Market:

Among all the regions, North America is expected to account for the significant share in the global smart insulin pens market. Growing incidence of diabetic patient due to high consumption of processed food and lifestyle changes, growing incidence of obesity. Further, technological advancements in smart insulin pens like as memory function, dose recorder, data transfer, and other features such as audible, visual and tactile feedback will increase the demand for smart insulin pens in North America, leading to a rise in the overall smart insulin pens market growth.

For instance, according to National Institute of Diabetes and Digestive and Kidney

Disease (NIH), National Diabetes Statistics Report 2020, in the year 2020 there were approximately 88 million adults' ages 18 years or older were having prediabetes in the United States. Prediabetes is a condition in which blood glucose levels are higher than normal but not high enough for a diagnosis of diabetes. Moreover, as per the same source, in the US more men (37.4% of U.S. adults) than women (29.2%) had prediabetes and among adolescents ages 12 to 18 years, more than 1 in 6 (18% of U.S. adolescents) had prediabetes. Additionally, as per the same source, in the year 2020 it was estimated 34.2 million people in the United States had diabetes out of which an estimated of 26.9 million people of all ages were diagnosed with diabetes and around 7.3 million adults ages 18 years or older had diabetes but were undiagnosed. In diabetes mellitus, insulin is given by external source as it is not formed in a proper amount in the body. The administration of insulin is done by devices like smart insulin pens. Thus, the rate of prevalence of prediabetes and diabetes is expected to increase in the United States in the forecast period owing to the increase in the demand of smart insulin pen.

Furthermore, unhealthy lifestyle is contributing for increase in the prevalence of chronic disease like diabetes. Adults who eat a healthy diet live longer, have a lower risk of obesity, heart disease, diabetes, and certain cancers. Most Americans, however, do not follow a healthy lifestyle. As per study conducted by Centers for Disease Control and Prevention (CDC) in the year 2021, it was concluded that fewer than 1 in 10 adults and adolescents eat enough fruits and vegetables, and 9 in 10 Americans aged 20 years or older consume more than the recommended amount of sodium. A diet high in fat, calories, and cholesterol increases the risk of diabetes. Moreover, according to CDC 2021, in the United States, in the year 2020 around 19% of young people aged 2 to 19 years and 40% of adults have obesity, which can put them at risk for heart disease, diabetes, and some cancers furthermore, more than one in three people have prediabetes, and more than 8 in 10 of them don't know they have prediabetes. From the above data it can be concluded that unhealthy lifestyle and obesity is one of the major cause for causing diabetes. This will increase the prevalence of diabetes in the forecast period further increasing the demand of insulin administration through devices like smart insulin pens, ultimately increasing the demand of smart insulin pens in the North America market.

Another factor responsible for increasing the product demand is technological advancements in the device. Various features of smart insulin pens like memory function, dose recorder, data transfer, dose range control, smartphone maintenance and updating, and development of cloud-based software are increasing the demand of the smart insulin pen in the North America. Technological advancements in smart

insulin pens offers various benefits like avoiding extra dosages, maintaining systematic record of dosages and easy conversion of information in computer-based records. The device also is connected with a system which calculates and tracks doses and provides helpful reminders, alerts, and reports. All the features are making the smart insulin pens more and more convenient and easy to use, thereby bolstering the market.

Thus, all the above-mentioned factors are anticipated to propel the market for smart insulin pens in the North America.

Smart Insulin Pens Market Key Players:

Some of the key market players operating in the smart insulin pens market include Emperra GmbH E-Health Technologies, Jiangsu Deflu Medical Device Co. Ltd., Medtronic, Novo Nordisk A/S, Pendiq., Sanofi, Berlin-Chemie, Bigfoot Biomedical, Digital Medics Pty Ltd., Eli Lilly and Company, Ypsomed, Dexcom, Inc., among others.

Recent Developmental Activities in the Smart Insulin Pens Market:

In March 2022, Novo Nordisk, one of the leading global healthcare company, announced that two smart connected insulin pens, NovoPen 6 and NovoPen Echo Plus, are now available on prescription for people living with diabetes treated with Novo Nordisk insulin in the UK. NovoPen 6 and NovoPen Echo Plus are insulin injection pens that record dosing information, including when and how much insulin was administered.

In March 2022, Glooko Inc., a leading provider of remote patient monitoring and data management solutions for diabetes and other chronic diseases, announced the acquisition of DIABNEXT. DIABNEXT offers a telemedicine platform that helps diabetic patients better manage their disease and stay in touch, remotely, with the health professionals who follow them, in order to improve the balance of their diabetes. The DIABNEXT mobile application completes Glooko's product portfolio.

In June 2021, Novo Nordisk Pharma, one of the leading global healthcare company announced that it has obtained Japanese regulatory approval for NovoPen 6 and NovoPen Echo Plus as medical devices, the first smart insulin pens to be approved in the country.

In May 2021, Eli Lilly and Company announced that it has signed strategic

international agreements with four companies – DexCom, Inc., Glooko Inc., myDiabby Healthcare and Roche – to advance connected solutions and streamline care for people living with diabetes in markets outside of the United States.

Key Takeaways from the Smart Insulin Pens Market Report Study

Market size analysis for current smart insulin pens market size (2021), and market forecast for 5 years (2022-2027)

The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the smart insulin pens market.

Top key product/services/technology developments, merger, acquisition, partnership, joint venture happened for last 3 years

Key companies dominating the global smart insulin pens market.

Various opportunities available for the other competitor in the smart insulin pens market space.

What are the top performing segments in 2021? How these segments will perform in 2027.

Which is the top-performing regions and countries in the current smart insulin pens market scenario?

Which are the regions and countries where companies should have concentrated on opportunities for smart insulin pens market growth in the coming future?

Target Audience who can be benefited from this Smart Insulin Pens Market Report Study

Smart insulin pens products providers

Research organizations and consulting companies

Smart insulin pens-related organizations, associations, forums, and other alliances

Government and corporate offices

Start-up companies, venture capitalists, and private equity firms

Distributors and Traders dealing in smart insulin pens

Various End-users who want to know more about the smart insulin pens market and latest technological developments in the smart insulin pens market.

Frequently Asked Questions for Smart Insulin Pens Market:

1. What are smart insulin pens?

A smart insulin pens, is a medical device which inject the insulin into the subcutaneous tissue. The main purpose of smart insulin pens is to avoid extra dosages, to maintain the systematic record of dosages and to convert information in computer-based records.

2. What is the market for Global smart insulin pens?

Global smart insulin pens market is estimated to grow at a CAGR of 12.59% during the forecast period from 2022 to 2027.

3. What are the drivers for the Global smart insulin pens market?

The smart insulin pens market is witnessing a positive market growth owing to increased prevalence of diabetes mellitus due to genetic factor, age, obesity, and unhealthy lifestyle, technological advancements in the device like providing real-time blood glucose level, enhanced awareness of self-management of treatment using the device, and increasing demand & advancements in telemedicine after pandemic across the world are anticipated to bolster the market.

4. Who are the key players operating in the Global smart insulin pens market?

Some of the key market players operating in the smart insulin pens market include Emperra GmbH E-Health Technologies, Jiangsu Deflu Medical Device Co. Ltd., Medtronic., Novo Nordisk A/S, Pendiq., Sanofi, Berlin-Chemie, Bigfoot Biomedical, Digital Medics Pty Ltd., Eli Lilly and Company, Ypsomed, Dexcom, Inc., others.

5. Which region has the highest share in smart insulin pens market?

North America is expected to hold the highest share in the revenue in the Smart insulin pens market during the forecast period. Growing incidence of diabetic patient due to high consumption of processed food and lifestyle changes, growing incidence of obesity, and technological advancements in smart insulin pens like as memory function, dose recorder, data transfer, and other features such as audible, visual and tactile feedback will increase the demand for smart insulin pens in North America.

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