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Self-Monitoring Blood Glucose Market (By Product Type, Application, Technology, Modality, End User, Distribution Channel and Region), Key Company Profiles, Market Dynamics, Trends and Recent Developments - Global Forecast to 2032

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Abstracts

The global self-monitoring blood glucose (SMBG) market was valued at US$ 16.42 billion in 2025 and is projected to reach US$ 25.04 billion by 2032, driven by the increasing global burden of diabetes, rising emphasis on proactive disease management, and growing adoption of home-based glucose monitoring solutions. SMBG devices, comprising blood glucose meters and compatible test strips, play a fundamental role in diabetes management by enabling individuals to monitor their blood glucose levels regularly across homecare and clinical settings. These solutions support effective glycemic control, facilitate treatment adjustments, improve patient adherence, and help reduce the risk of diabetes-related complications. Their accessibility and ease of use have established SMBG as an integral component of routine diabetes care, particularly among patients requiring frequent glucose assessments.

The rising prevalence of diabetes represents a major growth driver for the SMBG market. According to the International Diabetes Federation (IDF), approximately 589 million adults aged 20-79 years were living with diabetes globally, with this figure projected to increase to 853 million by 2050. The expanding diabetic population is generating sustained demand for reliable and cost-effective glucose monitoring solutions that support long-term disease management. Furthermore, increasing awareness of the importance of regular blood glucose monitoring, coupled with the growing preference for decentralized and home-based healthcare, is strengthening the adoption of SMBG devices. These solutions provide patients with greater autonomy in managing their condition by enabling convenient glucose measurements at home or

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while travelling, reducing dependence on frequent healthcare facility visits and supporting more informed treatment decisions.

Technological advancements in blood glucose meters and test strips are further shaping market development by improving measurement accuracy, operational convenience, portability, and overall user experience. The integration of digital capabilities, including Bluetooth connectivity, smartphone-compatible applications, cloud-based data storage, and glucose data analytics, is enhancing the ability of patients and healthcare professionals to track glucose trends and make informed clinical decisions. In parallel, increasing demand for affordable, accessible, and minimally invasive monitoring solutions is encouraging product innovation and broader market penetration, particularly in emerging economies. Collectively, the convergence of rising diabetes prevalence, expanding homecare adoption, and digital innovation is expected to sustain demand for SMBG solutions and support the market's growth over the forecast period.

Recent Developments

In August 2026, Ascensia Diabetes Care received FDA 510(k) clearance for its CONTOUR PLUS BLUE, CONTOUR NEXT GEN, and CONTOUR NEXT ONE blood glucose monitoring systems. The clearance covers modifications to the CONTOUR Diabetes App, including enhancements to its user interface, data management, and cloud integration. This development highlights the growing role of connected applications and cloud-based data management in enhancing SMBG capabilities and supporting more integrated diabetes management.

In May 2026, Abbott secured CE Mark approval for its Libre Duo and Libre Duo 10 Day systems, introducing dual glucose-ketone sensing technology that continuously monitors both glucose and ketone levels. The systems integrate with Abbott's Libre digital health ecosystem, enabling users to share monitoring data with healthcare professionals and caregivers. This development highlights the expansion of established diabetes monitoring manufacturers into advanced, connected monitoring technologies, intensifying the shift beyond conventional SMBG devices toward integrated diabetes management solutions.

In January 2026, Smart Meter launched iGlucose Touch, a next-generation blood glucose meter featuring a touchscreen interface and cellular connectivity. The device automatically transmits glucose readings to remote patient monitoring platforms, eliminating the need for Bluetooth pairing, Wi-Fi, or smartphone applications. It also offers a five-second testing time and storage

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capacity for up to 1,000 readings. This development highlights the growing integration of SMBG devices with remote patient monitoring platforms, enhancing data accessibility and supporting connected diabetes management.

By Product Type: Global Self-Monitoring Blood Glucose Market - Key Takeaways

Test strips dominated the global SMBG market in 2025, driven by their essential role in routine blood glucose monitoring and recurring replacement requirements. As each test requires a new strip, frequent daily testing, particularly among insulin-dependent patients, generates consistent repeat demand. The expanding diabetic population, widespread adoption of home-based glucose monitoring, affordability, and compatibility with multiple glucose meter models further support segment dominance.

SMBG meters accounted for the second-largest share of the global market in 2025, supported by their essential role in enabling routine blood glucose monitoring across homecare and clinical settings. Demand is driven by the replacement of existing devices, increasing diabetes prevalence, and growing adoption of connected meters featuring Bluetooth and cellular connectivity. Advanced meters with digital integration and data-sharing capabilities are strengthening patient engagement and supporting remote diabetes management, while affordable conventional meters continue to drive adoption in price-sensitive markets.

Lancets are expected to witness steady growth over the forecast period, driven by their essential role in capillary blood sampling for routine SMBG testing. Rising testing frequency and the expanding diabetic population support recurring demand. Technological improvements, including thinner needles, adjustable penetration settings, and reduced-pain designs, are enhancing patient comfort and usability.

By Application: Global Self-Monitoring Blood Glucose Market - Key Takeaways

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Type 2 diabetes dominated the global SMBG market in 2025, supported by its large patient population and continued reliance on blood glucose monitoring for routine disease management. Patients managing the condition through lifestyle modifications, oral medications, and insulin therapy use SMBG readings to guide treatment decisions and monitor glycemic control. The segment's sustained demand is further supported by the affordability and accessibility of blood glucose meters and recurring consumables, particularly test strips.

Type 1 diabetes is expected to maintain a significant share of the SMBG market, despite representing a smaller patient population, due to the need for frequent glucose monitoring to support insulin dosing and glycemic control. Demand is supported by regular testing requirements, particularly among pediatric and insulin-dependent patients, encouraging the development of user-friendly meters with features such as voice prompts and simplified interfaces.

Gestational diabetes represents a growing SMBG application segment, supported by rising maternal age, obesity prevalence, and greater awareness and screening. The need for regular glucose monitoring to maintain pregnancy-specific glycemic targets drives demand for blood glucose meters, test strips, and lancets. SMBG remains widely adopted in prenatal care due to its affordability, accessibility, and established clinical use, making it a practical monitoring solution throughout pregnancy.

By Technology: Global Self-Monitoring Blood Glucose Market - Key Takeaways

Electrochemical sensors dominated the global SMBG market in 2025, driven by their established reliability, cost efficiency, and widespread adoption in commercial blood glucose meters. These sensors use enzyme-based electrochemical reactions to measure glucose concentrations, supporting accurate glucose measurements, rapid response times, and compatibility with compact test strips. Continuous improvements in sensor design, including miniaturized electrodes and reduced blood-sample requirements, are further enhancing testing convenience and device performance. Meanwhile, Photometric sensors account for a smaller market share but offer growth opportunities through advancements in optical sensing technologies. However, electrochemical platforms are expected to maintain their dominance, supported

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by established manufacturing capabilities, affordability, and extensive market adoption.

By Modality: Global Self-Monitoring Blood Glucose Market - Key Takeaways

Hand-held conventional meters dominated the global SMBG market in 2025, supported by their affordability, ease of use, portability, and established adoption across homecare and clinical settings. Their relatively low upfront cost and simple testing procedures make them accessible to a broad diabetic population. Meanwhile, connected glucose meters are gaining traction through Bluetooth and cellular connectivity, enabling automatic data transmission, glucose trend tracking, and integration with digital diabetes management platforms. Growing adoption of connected solutions is expected to strengthen demand for digitally integrated SMBG devices and support remote patient monitoring.

By End-User: Global Self-Monitoring Blood Glucose Market - Key Takeaways

Home-care settings dominated the global SMBG market in 2025, driven by the growing preference for self-managed diabetes care and the need for regular blood glucose monitoring outside healthcare facilities. The increasing diabetic population, rising patient awareness, and availability of affordable, user-friendly monitoring devices support adoption in residential settings. Furthermore, the expansion of remote patient monitoring, digital health applications, and home-based care programs is strengthening the role of SMBG in routine diabetes management.

Hospitals and clinics represent an important SMBG end-user segment, supported by the need for routine glucose monitoring in inpatient care, perioperative management, and clinical assessments. Blood glucose meters and test strips are used for point-of-care testing, treatment monitoring, and patient education during hospital stays. Institutional procurement prioritizes measurement accuracy, product reliability, regulatory compliance, and consistent supply, favoring established manufacturers. Despite increasing CGM

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adoption, conventional blood glucose testing remains integral to hospital workflows, supporting continued demand across clinical settings.

By Distribution Channel: Global Self-Monitoring Blood Glucose Market - Key Takeaways

Retail pharmacies dominated the global SMBG market in 2025, supported by their widespread accessibility and role in distributing blood glucose meters, test strips, and lancets. Patients benefit from the convenient availability of monitoring supplies alongside prescription medications and pharmacist guidance. Growing diabetes prevalence and the need for regular replenishment of consumables further strengthen this distribution channel.

Hospital pharmacies accounted for the second-largest share of the global SMBG market in 2025, driven by institutional procurement and the distribution of glucose monitoring devices during treatment and patient discharge. They support early product adoption and continuity of diabetes care at home. Demand is influenced by hospital purchasing agreements, product reliability, clinical validation, and consistent supply availability.

Online pharmacies are gaining traction in the global SMBG market, driven by the growing preference for convenient purchasing of blood glucose meters, test strips, and lancets. E-commerce platforms and subscription-based services support recurring consumable purchases through home delivery, competitive pricing, and wider product accessibility. The channel is particularly attractive to homecare users and patients in areas with limited pharmacy access. Growing online adoption is encouraging manufacturers to strengthen digital distribution, product authentication, and direct-to-consumer engagement.

By Region: Global Self-Monitoring Blood Glucose Market - Key Takeaways

North America dominated the global SMBG market in 2025, supported by the high prevalence of diabetes, established healthcare infrastructure, favorable reimbursement policies, and the strong presence of leading market participants.

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The United States represents the largest contributor to regional revenue, driven by its substantial diabetic population, high healthcare expenditure, and continuous introduction of advanced blood glucose monitoring products. Furthermore, Medicare Part B and private insurance coverage for eligible blood glucose meters and testing supplies improve patient access and support recurring demand for test strips and other consumables. The region's established regulatory framework and growing adoption of connected glucose monitoring devices further reinforce its market leadership.

Europe accounted for the second-largest share of the global SMBG market in 2025, with Germany representing the leading contributor to regional revenue. Regional demand is supported by established healthcare infrastructure, high diabetes awareness, and public health insurance coverage for eligible glucose monitoring devices and testing supplies. Reimbursement policies, particularly for insulin-dependent patients, support recurring demand for test strips and other consumables.

Asia-Pacific is expected to register the fastest growth in the global SMBG market over the forecast period, driven by large diabetic populations, rising disease awareness, expanding diagnosis rates, and improving healthcare infrastructure. China and India represent major growth contributors, supported by large diabetic populations, expanding diabetes screening programs, and increasing demand for affordable home-based glucose monitoring solutions. Japan's market is supported by advanced healthcare infrastructure, high adoption of technologically advanced glucose meters, and established diabetes management practices.

iGATE RESEARCH report titled “Self-Monitoring Blood Glucose Market (By Product Type, Application, Technology, Modality, End User, Distribution Channel and Region), Key Company Profiles, Market Dynamics, Trends and Recent Developments - Global Forecast to 2032” provides a comprehensive analysis of the Global Self-Monitoring Blood Glucose Market.

This report has been analyzed from 13 View Points:

1) Global - Self-Monitoring Blood Glucose Market and Forecast (2022 - 2032)

2) Global - Self-Monitoring Blood Glucose Market Share and Forecast (2022 -

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2032)

3) By Product Type - Global Self-Monitoring Blood Glucose Market and Forecast (2022 - 2032)

4) By Application - Global Self-Monitoring Blood Glucose Market and Forecast (2022 - 2032)

5) By Technology - Global Self-Monitoring Blood Glucose Market and Forecast (2022 - 2032)

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11) Global Self-Monitoring Blood Glucose Market - Key Company Profiles

12) Global Self-Monitoring Blood Glucose Market - Trends & Recent Developments

13) Global Self-Monitoring Blood Glucose - Market Dynamics

By Product Type: Global Self-Monitoring Blood Glucose Market and Forecast

Test Strips

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SMBG Meters

Lancets

Control Solutions

By Application: Global Self-Monitoring Blood Glucose Market and Forecast

Type 1 Diabetes

Type 2 Diabetes

Gestational Diabetes

Prediabetes

By Technology: Global Self-Monitoring Blood Glucose Market and Forecast

Electrochemical

Photometric

By Modality: Global Self-Monitoring Blood Glucose Market and Forecast

Hand-held Conventional

Wearable / Connected

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By End-User: Global Self-Monitoring Blood Glucose Market and Forecast

Hospitals & Clinics

Home-care Settings

Diagnostic Laboratories

Ambulatory Surgical Centers

By Distribution Channel: Global Self-Monitoring Blood Glucose Market and Forecast

Retail Pharmacies

Hospital Pharmacies

Online Pharmacies

Others

By Region: Global Self-Monitoring Blood Glucose Market and Forecast

1. North America

United States

Canada

Mexico

2. Europe

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Germany

United Kingdom

France

Italy

Spain

Netherlands

Rest of Europe

3. Asia Pacific

China

Japan

India

Australia

South Korea

Rest of Asia Pacific

4. Latin America

Brazil

Argentina

Rest of Latin America

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5. Middle East & Africa

Saudi Arabia

UAE

South Africa

Rest of Middle East and Africa

Global Self-Monitoring Blood Glucose Market - Key Company Profiles

1. F. Hoffmann-La Roche Ltd

2. Abbott Laboratories

3. LifeScan Inc.

4. Ascensia Diabetes Care Holdings AG

5. PHC Holdings Corporation

6. Sinocare Inc

7. ARKRAY Inc

8. Terumo Corporation

9. i-SENS Inc.

10. B. Braun Melsungen AG

11. Bionime Corporation

12. DarioHealth Corp

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13. Nova Biomedical Corporation

14. AgaMatrix Inc

15. Omnis Health (Trividia Health)

16. ForaCare Inc

17. ACON Laboratories

18. Trividia Health

19. Rossmax International

20. Ypsomed AG

21. OK Biotech Co. Ltd.

22. SD Biosensor Inc.

23. Menarini Diagnostics (GlucoMen)

24. Beurer GmbH

Data Source

iGATE RESEARCH employs rigorous primary and secondary research techniques in developing distinctive data sets and research material for business reports. This report is built by using data and information sourced from Proprietary Information Database, Primary and Secondary Research Methodologies, and In house analysis by iGATE Research dedicated team of qualified professionals with deep industry experience and expertise.

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12.3 LifeScan Inc.
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12.5 PHC Holdings Corporation
12.6 Sinocare Inc
12.7 ARKRAY Inc
12.8 Terumo Corporation
12.9 i-SENS Inc.
12.10 B. Braun Melsungen AG

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12.11 Bionime Corporation
12.12 DarioHealth Corp
12.13 Nova Biomedical Corporation
12.14 AgaMatrix Inc
12.15 Omnis Health (Trividia Health)
12.16 ForaCare Inc
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