

Global Insulin Pumps Industry (China-specific Market Assessment) – Drivers, Restraints, Opportunities, Trends, and Forecasts: 2018–2024

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Abstracts

Global Insulin Pumps Industry (China-specific Market Assessment) – Drivers, Restraints, Opportunities, Trends, and Forecasts: 2018–2024

Overview: An insulin pump is a device that contains a cartridge of rapid-acting insulin. Insulin infusion pumps work as an alternative to the traditional system of daily injections or an insulin pen. These reduce large swings in blood glucose level, deliver insulin more accurately when compared to injections, scheduling of meal timings is not required, and are less painful. These user-friendly properties of insulin pumps are making patients shift toward the use of infusion pumps.

According to the WHO estimates, the number of people with diabetes has increased from 108 million in 1980 to 422 million in 2014. The market for insulin pumps is growing due to increase in the number of diabetes cases among all age groups. The demand for insulin pumps is high due to varied features and functionalities.

The insulin pumps market has been segmented into traditional insulin pumps, disposable insulin pumps, smart pumps, insulin reservoirs, insulin infusion sets, and other devices. North America is leading with technological innovations, followed by Europe and Asia Pacific. Asia Pacific is expected to witness rapid growth during the forecast period due to increased incidence of diabetes in the region. However, the high cost of infusion pumps, development of oral insulin, and insulin aerosols in the form of inhalers can pose a challenge to the insulin pumps market in future.

Effects of Diabetes:

Nearly 3.5 million people die annually due to complications related to high blood sugar. Some of the adverse effects of diabetes are as follows:

High risk of heart diseases and stroke.

High risk for diabetic retinopathy.

Increased risk of kidney failure; about 10–20% diabetics die due to renal failure.

Individuals with diabetes often suffer from untreated anemia, which leads to fatigue and other health-related complications.

Incidence and Prevalence:

Diabetes is one of the most prominent non-communicable diseases prevailing globally. According to the seventh edition of IDF Atlas, in 2015, there were 415 million people with diabetes (aged 20–79 years), and the number is expected to reach 642 million by 2040.

Prevalence of Diabetes Population Forecasting by Region

Region 2015 (in millions) 2040 (in millions)

North America and the Caribbean 44 61

South and Central America 30 49

Europe 60 71

Middle East and North Africa 35 72

Rest of Africa 14 34

South East Asia 78 140

Western Pacific 158 215

Market Analysis: The global insulin pumps market is estimated to witness a CAGR of 9.7% during the forecast period 2018–2024. Increased prevalence of diabetes, growing popularity of advanced insulin pumps, and the introduction of new technologies are driving the market growth. The market is analyzed based on three segments, namely product types, end-users, and regions.

Regional Analysis: The regions covered in the report are North America, Europe, Asia

Pacific, and Rest of the World (ROW). North America is set to be the leading region for the insulin pumps market growth followed by Europe. Asia Pacific and ROW are set to be the emerging regions. The emerging markets have a high potential to grow owing to an increase in patient population and focus toward healthcare infrastructure.

The insulin pumps market has the lowest penetration in emerging regions, and most of the vendors are targeting India, Thailand, Indonesia, and Vietnam. These countries are the major revenue contributors in the APAC region. A higher incidence of obesity will fuel the market expansion, which will result in the high prevalence of diabetes. Around 114.1 million people in China are suffering from diabetes (type 1 & type 2), among which type 2 diabetes is more prevalent. China lacks innovative technologies and access to current trends in diabetes management, which further adds to the growth of diabetic population in the region. However, the high cost of insulin pumps, expensive consumables cost, lack of proper reimbursement policies, lack of awareness about insulin pumps in developing countries will have a significant impact on the overall market growth.

Product Analysis: Tethered insulin pump is dominating with more than 70% of the market share. Tethered insulin pumps have a long flexible tube and are the most common pumps used among diabetic patients. Increasing aging population, rise in prevalence of diabetes, need for early prevention of diseases, and growing awareness about a healthy lifestyle are expected to drive the market growth. The high cost of insulin pumps is the primary concern and challenge to the market. Many insurance providers do not have complete reimbursement for insulin pumps, and the usage of these pumps is subjective to the insurance provider in most of the developed countries. An insulin pump is cost-effective only if it is covered under health insurance.

Key Players: Insulet Corp., Medtronic plc, MicroPort Scientific Corp., F. Hoffmann-La Roche (Roche) Ltd., Tandem Diabetes Care, and other predominate & niche players.

Competitive Analysis: The insulin pumps market is highly fragmented and has immense growth opportunities for vendors, especially in developing regions. The market has the presence of many global, regional, and local players with strong competition among each other.

Benefits: The report provides complete details about the usage and adoption rate of insulin pumps for the treatment of diabetes. Thus, the key stakeholders can know about the major trends, drivers, investments, vertical player's initiatives, and government initiatives toward insulin pumps in the upcoming years along with details of the pureplay

companies entering the market. Moreover, the report provides details about the major challenges that are going to impact the market growth. Additionally, the report gives complete details about the key business opportunities to key stakeholders in order to expand their business and capture the revenue in specific verticals, and to analyze before investing or expanding the business in this market.

Key Stakeholders:

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