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Global Continuous Glucose Monitoring (CGM) Market

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Abstracts

Continuous Glucose Monitoring (CGM) Market Overview

The global continuous glucose monitoring (CGM) market is projected to reach $16,574 million by 2025 from 2016 value of $830 million growing at a CAGR of 33.5% during 2017 - 2025.Continuous glucose monitor (CGM) system chiefly consists of three major components, namely sensors, transmitters & receivers and Insulin Pumps. However, in conventional CGM systems, insulin pumps were optional, whereas they are an integral part of modern CGMs. CGMs are more expensive than the conventional glucose monitoring systems. Technological innovation such as launch of artificial pancreas has taken diabetic care management to a next level. Recently, artificial pancrea got FDA approval. Thus, advancement in CGM systems makes possible early detection of hypoglycemia in an easy manner in comparison to infrequent point-of-care glucose meter measurements. However, there are few limitations associated with the CGMs, as they do not replace finger prick method for accurate readings, they require skill and training in diabetes management and they are not yet covered by majority of the insurance providers.

Currently CGMs are chiefly used in home settings, diagnosed centers and hospitals. Main use of CGMs are for continuously monitoring the glucose level irrespective of the location and its usage is almost hassle free and hence is comfortably used in home settings. Diagnostics center is another application area which is also gaining popularity due to increase in use in case studies so as to allow effective reporting methods of glucose levels. Currently, adoption of CGMs in the hospitals settings currently is not overwhelming however it is expected to gain a boost in next three to four years as it offers benefits in ICU medication such as:

Detection of hypo-hyperglycemia

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Prediction of future glucose levels

Instant feedback regarding treatment

Improved patient comfort

Assistance with insulin dose

Less time

In the past, blood glucose meters were used in diagnostic centers/clinics for blood glucose monitoring, which simply displayed the glucose level. However, continuous glucose monitors replaced meters to a significant extent, as they are convenient and less painful to use. CGM provides patients with glucose trend graphs, alerts on highs or lows in glucose levels (anytime as customized), and insights into how food and activity patterns impact diabetes. Many diagnostic centers set up a professional CGM program. In this program, the device records glucose measurements after a predetermined period of time throughout the day and send alerts through alarm signals. All the readings and measurements are mostly downloaded onto a computer for analysis. Some devices have the ability to record events related to diet, exercise and insulin doses, which enables patients to understand the effectiveness of their diabetes management program. This stored data allow medical practitioners to understand patients efforts towards managing diabetes and where they need to improve. However, the main concern with CGM is accuracy.

The CGM systems need to be calibrated with a finger-stick (twice or thrice a day) to ensure improved accuracy. Patients thus require finger-sticks for calibration, and it is also recommended to use finger-stick measurements for checking hypoglycemia or hyperglycemia before taking corrective action.

To manage diabetes effectively, real-time continuous glucose monitoring is of utmost importance across all age groups. Continuous glucose monitoring system (CGMS) enables effective managing blood glucose levels by providing trend data as well as alarms for the fluctuations in glucose levels. Adult population (>14years) segment was the highest contributor to the global continuous glucose monitoring systems market.

Incidences of diabetes in children are increasing every year. Europe has highest prevalence of diabetes with type-1 diabetes around 129,000 with 20,000 new cases per

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year. Approximately half of the patients diagnosed with type-1 diabetes are children every year. Countries such as the U.K., the Russian Federation and France have highest number of Type-1 diabetic children patients.

In low income regions such as Africa and some of the Asian countries children diagnosed with type-1 diabetes often goes undiagnosed. Even if they are diagnosed in time they lack means to obtain insulin, syringes and monitoring devices and as a result they die. This is the main reason why we get to see lesser number of children patients with diabetes in such regions.

KEY BENEFITS

The report ranks the factors that are responsible to accelerate the market growth driven by upper hand of CGM over Self-monitoring glucose devices, approval for artificial pancreas and many more.

Market is forecast for the period 2017 - 2025 with market revenues for 1 historic years 2016.

Identification and analysis of key pockets of investment for CGM manufacturers.

Identification of challenges that must be addressed and overcome in the CGM market to achieve fiscal success throughout the market.

Analysis of regulatory framework that regulates introduction of new CGM and puts light on reimbursement scenario.

The report identifies and profiles key market participants that would drive innovation in the CGM market.

KEY MARKET SEGMENTS

BY DEVICES

Transmitter and Receivers

Sensors

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Insulin Pump

BY APPLICATION

Diagnostics/Clinics

Hospitals

Home Settings

BY AGE

Adult Population (>14years)

Child Population (?14years)

BY GEOGRAPHY

North America

Europe

Asia Pacific

Row

KEY AUDIENCES

Medical Devices Manufacturers

Research Institutions

Healthcare Institutions

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Fig. 32 FINANCIAL REVENUES BY GEOGRAPHY (2012)

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