

# **Japan Diabetes Management Market, By Product (Continuous Blood Glucose Monitoring System, Smart Insulin Pen, Smart Glucose Meter, Smart Insulin Pumps), By Type (Wearable Devices and Handheld Devices), By End Use (Hospitals, Home settings, and Diagnostic Centers), By Region, Competition, Forecast & Opportunities, 2020-2030F**

<https://marketpublishers.com/r/J1077AC4E4F5EN.html>

Date: August 2024

Pages: 80

Price: US\$ 3,500.00 (Single User License)

ID: J1077AC4E4F5EN

## **Abstracts**

Japan Diabetes Management Market was valued at USD 948.14 Million in 2024 and is expected to reach USD 1445.59 Million by 2030 with a CAGR of 7.24% during the forecast period. The Japan Diabetes Management Market is being driven by several key factors. The increasing prevalence of diabetes, attributed to aging populations, sedentary lifestyles, and dietary changes, significantly fuels market demand.

Advancements in diabetes technology, such as continuous glucose monitors and insulin pumps, are enhancing disease management and patient outcomes. Rising healthcare expenditure supports the adoption of innovative treatment solutions and improves access to care. Government initiatives and public health campaigns focused on diabetes awareness and prevention further contribute to market growth. The integration of digital health solutions, including telemedicine and mobile health apps, is also transforming diabetes management by providing patients with real-time monitoring and personalized care. These factors collectively drive the expansion and development of the diabetes management market in Japan.

### **Key Market Drivers**

Rising Prevalence of Diabetes

The rising prevalence of diabetes in Japan represents a pivotal driver of the diabetes management market, reflecting broader global trends but also specific regional challenges. Diabetes, particularly type 2 diabetes, has seen an alarming increase due to demographic shifts, lifestyle changes, and evolving health patterns. Japan's aging population is a key factor contributing to the growing prevalence of diabetes. As life expectancy in Japan is among the highest globally, a significant portion of the population is elderly. This demographic is at increased risk for developing type 2 diabetes due to natural physiological changes and age-related insulin resistance. According to a study, in recent years, Japan has experienced a significant rise in diabetes cases, making it one of the countries most impacted by the global diabetes epidemic. The Ministry of Health, Labour and Welfare (MHLW) has recognized diabetes as a major healthcare priority. While Type 1 diabetes remains rare in Japan, Type 2 diabetes is widespread among both adults and children. This increase is largely attributed to a growing number of individuals with Type 2 diabetes, driven by longer life expectancy and changing lifestyle factors. Currently, approximately 13.5% of the Japanese population either has Type 2 diabetes or exhibits impaired glucose tolerance. This high prevalence places a substantial economic strain on the healthcare system, with diabetes accounting for up to 6% of the total healthcare budget.

Lifestyle changes have exacerbated the diabetes epidemic. Rapid urbanization, dietary shifts towards more processed and high-calorie foods, and a reduction in physical activity are significant contributors to the rising incidence of diabetes. The traditional Japanese diet, once rich in vegetables, fish, and rice, is increasingly being replaced by Western dietary patterns that include more sugars, fats, and processed foods. This dietary transition is closely linked to obesity and metabolic syndrome, both of which are major risk factors for type 2 diabetes. The impact of sedentary lifestyles cannot be overlooked either. With the advancement of technology, many aspects of daily life that once required physical effort have become more sedentary, from desk jobs to leisure activities. The reduction in physical activity levels contributes to weight gain and insulin resistance, which are critical components in the development of diabetes. The rising prevalence of diabetes is driving demand for a wide array of management solutions, from glucose monitoring devices and insulin therapies to lifestyle modification programs and educational resources. As the number of diabetes cases grows, it does the need for effective and comprehensive management strategies to handle this chronic condition. This surge in demand stimulates growth in the diabetes management market, as healthcare providers and patients seek advanced solutions to manage and mitigate the impacts of diabetes.

## Technological Advancements in Diabetes Care

Technological advancements in diabetes care are transforming the management landscape, driving significant growth in the diabetes management market. Innovations such as continuous glucose monitoring (CGM) systems, insulin pumps, and advanced insulin delivery systems are revolutionizing how diabetes is managed, offering enhanced accuracy, convenience, and efficacy in treatment. Continuous glucose monitors (CGMs) represent a major leap forward in diabetes management. These devices provide real-time glucose readings throughout the day and night, allowing patients to make immediate adjustments to their diet, exercise, or medication. CGMs improve glycemic control by offering a more comprehensive view of glucose trends and fluctuations, which helps in fine-tuning management strategies and reducing the risk of both hypoglycemia and hyperglycemia. Insulin pumps are another significant technological advancement. Unlike traditional insulin injections, which require multiple daily doses, insulin pumps deliver a continuous supply of insulin through a small catheter placed under the skin. This method provides a more stable and adjustable insulin delivery, which can lead to better glycemic control and a reduction in the number of injections needed. Modern insulin pumps are often equipped with features like integrated CGMs and automated insulin delivery adjustments, further enhancing their effectiveness. In April 2023, Eli Lilly Japan and Mitsubishi Tanabe Pharma Corporation (MTPC) announced the introduction of Mounjar subcutaneous injection 2.5 mg / 5 mg ATEOS in Japan. Mounjar is the world's first sustained-release GIP (glucose-dependent insulinotropic polypeptide) and GLP-1 (glucagon-like peptide-1) receptor agonist. This innovative treatment activates both the GIP and GLP-1 receptors. Although Mounjar is a single molecule derived from the natural GIP peptide sequence, it has been engineered to also bind to the GLP-1 receptor, providing extended action to enhance blood glucose control. Administered weekly via subcutaneous injection using a single-use autoinjector device (ATEOS), Mounjar is delivered with a pre-installed needle. The injection process is automated: pressing the button on the special pen injector inserts the needle and delivers the dose, eliminating the need for patients to handle the needle or set the dosage.

The development of smart insulin pens and connected diabetes management platforms is also transforming the market. Smart insulin pens track and record insulin doses, providing data on medication adherence and helping patients optimize their insulin usage. Connected platforms integrate data from various diabetes management devices, such as CGMs and insulin pumps, allowing for a more cohesive management strategy. These technologies facilitate better communication between patients and healthcare providers, enabling more personalized and effective treatment plans. The integration of

these advanced technologies in diabetes care is driving market growth by expanding the range of available management solutions and improving patient outcomes. The continuous evolution and introduction of new technologies ensure that the market remains dynamic, with ongoing innovations addressing the evolving needs of diabetes patients.

### Increased Healthcare Expenditure

Increased healthcare expenditure in Japan is a significant driver of the diabetes management market, reflecting the country's commitment to addressing chronic diseases and improving healthcare outcomes. Japan's healthcare system is supported by substantial public and private investment, which facilitates the adoption of advanced diabetes management solutions and enhances overall care quality. The Japanese government allocates considerable resources to healthcare, driven by the need to manage the growing burden of chronic conditions like diabetes. This investment supports a wide range of initiatives, including subsidies for diabetes medications, funding for advanced medical technologies, and expansion of healthcare services. By increasing funding for diabetes care, the government helps to make advanced treatments and management tools more accessible to patients, improving their ability to manage their condition effectively.

Increased healthcare expenditure allows for the development and implementation of innovative diabetes management programs. These programs often include comprehensive care models that integrate medical, nutritional, and psychological support, providing patients with a holistic approach to managing their diabetes. Enhanced funding also supports the training and development of healthcare professionals, ensuring that they have the skills and knowledge needed to deliver high-quality care. The financial support provided by increased healthcare expenditure is crucial for driving market growth. It enables the widespread adoption of new technologies and therapies, improves access to care, and supports ongoing research and development in the field of diabetes management. This investment not only benefits patients by providing them with better management options but also contributes to the overall growth and advancement of the diabetes management market in Japan.

### Growing Awareness and Education

Growing awareness and education about diabetes are pivotal drivers of the diabetes management market in Japan. Public health campaigns, educational initiatives, and

community outreach programs play a crucial role in increasing understanding of diabetes, promoting early detection, and encouraging effective management practices. Public health campaigns aimed at raising awareness about diabetes are essential in educating the general population about the risks, symptoms, and prevention strategies associated with the disease. These campaigns often target high-risk groups, such as individuals with a family history of diabetes or those with risk factors like obesity or a sedentary lifestyle. By increasing public awareness, these campaigns help reduce the stigma associated with diabetes and encourage individuals to seek early diagnosis and treatment.

Educational initiatives, including diabetes education programs and workshops, provide patients with the knowledge and tools needed to manage their condition effectively. These programs cover a range of topics, including blood glucose monitoring, insulin administration, dietary recommendations, and lifestyle modifications. By equipping patients with the information they need, these educational efforts empower individuals to take an active role in their diabetes management, leading to better health outcomes and improved quality of life.

Community outreach programs also play a vital role in diabetes education. These programs often involve collaboration between healthcare providers, local organizations, and community leaders to offer support and resources to individuals living with diabetes. By providing access to educational materials, support groups, and health screenings, these programs help to build a supportive network for diabetes patients and their families. The emphasis on awareness and education is driving market growth by fostering a more informed patient population and increasing demand for diabetes management solutions. As awareness and education efforts continue to expand, the market for diabetes management products and services is likely to see sustained growth, reflecting the positive impact of these initiatives on patient care and outcomes.

## Key Market Challenges

### High Cost of Diabetes Management

The high cost of diabetes management presents a significant challenge to the market in Japan, impacting both patients and the healthcare system. Diabetes management encompasses a wide range of expenses, including medications, glucose monitoring devices, insulin pumps, and regular medical consultations. These costs can be substantial, especially for individuals with complex or uncontrolled diabetes who require advanced therapies and frequent healthcare services.

For patients, the financial burden of managing diabetes can be overwhelming. Insulin and other diabetes medications, continuous glucose monitors (CGMs), and insulin pumps can be expensive, and not all costs may be fully covered by insurance. This can lead to medication non-adherence, reduced utilization of essential diabetes management tools, and ultimately poorer health outcomes. The financial strain can also contribute to increased stress and lower quality of life, exacerbating the challenges of living with diabetes.

From a healthcare system perspective, the high costs associated with diabetes management place a significant strain on public health resources. The growing prevalence of diabetes and the associated rise in healthcare expenses create challenges in allocating resources and managing budgets effectively. This financial burden can impact the availability of other healthcare services and limit investments in new technologies and treatment options. Efforts to address this challenge include initiatives to improve insurance coverage, reduce the cost of diabetes medications and devices, and promote cost-effective management strategies. Innovations in diabetes technology and treatments that offer better cost-efficiency can also help mitigate the financial impact on patients and the healthcare system. However, balancing cost and quality of care remains an ongoing challenge for the diabetes management market in Japan.

### Lack of Integration in Diabetes Care

A lack of integration in diabetes care represents a significant challenge in the management of the condition in Japan. Effective diabetes management often requires a coordinated approach that includes medical treatment, lifestyle modifications, and ongoing monitoring. However, fragmented care and inadequate coordination among different healthcare providers can hinder the effectiveness of diabetes management. Patients with diabetes often see multiple healthcare providers, including primary care physicians, endocrinologists, dietitians, and diabetes educators. Without effective integration and communication among these providers, patients may experience gaps in care, inconsistent treatment plans, and a lack of cohesive support. This can lead to suboptimal management of diabetes and increased risk of complications.

The integration of diabetes management technologies, such as continuous glucose monitors and insulin pumps, into overall care can be challenging. Effective use of these technologies requires coordination between patients, healthcare providers, and technology developers to ensure that data is accurately interpreted and used

to inform treatment decisions. Addressing the lack of integration in diabetes care involves fostering collaboration among healthcare providers, utilizing integrated care models, and improving communication and data sharing. Integrated care approaches that bring together various components of diabetes management can enhance the overall quality of care, improve patient outcomes, and reduce the risk of complications.

## Key Market Trends

### Integration of Digital Health Solutions

The integration of digital health solutions is revolutionizing the diabetes management market in Japan, offering new opportunities for improving patient care and enhancing management outcomes. Digital health technologies, including telemedicine, mobile health apps, and connected diabetes management platforms, are transforming how diabetes is managed and monitored. Telemedicine has become increasingly important in diabetes care, providing patients with convenient access to healthcare professionals without the need for in-person visits. This is particularly beneficial for individuals living in remote or underserved areas where access to specialist care may be limited. Telemedicine consultations allow for regular monitoring, medication adjustments, and education, improving overall diabetes management and patient engagement.

Mobile health apps are another significant advancement in diabetes management. These apps offer a range of features, including blood glucose tracking, medication reminders, and personalized feedback. By providing patients with real-time data and insights, mobile health apps empower individuals to manage their condition more effectively and make informed decisions about their treatment. The convenience and accessibility of these apps contribute to better adherence to management plans and improved glycemic control. Connected diabetes management platforms integrate data from various devices, such as continuous glucose monitors and insulin pumps, into a single system. This integration allows for a comprehensive view of a patient's diabetes management, facilitating more personalized and targeted treatment plans. These platforms also enable better communication between patients and healthcare providers, supporting collaborative care.

### Increased Research and Development Investment

Increased investment in research and development (R&D) is a major driver of the diabetes management market in Japan, spurring innovation and the development of

new treatment options. The continuous evolution of diabetes care is fueled by substantial R&D efforts aimed at discovering new therapies, improving existing treatments, and advancing diabetes management technologies. Pharmaceutical companies, biotechnology firms, and research institutions are investing heavily in R&D to address the unmet needs of diabetes patients. This includes the development of novel drug classes, such as new insulin formulations and glucose-lowering agents, as well as innovative delivery systems. Advances in drug development are aimed at improving efficacy, reducing side effects, and providing more convenient treatment options for patients.

In addition to drug development, R&D investment is also focused on enhancing diabetes management technologies. This includes advancements in continuous glucose monitoring (CGM) systems, insulin pumps, and smart insulin pens. Researchers are working on integrating these technologies with digital health platforms to provide comprehensive, real-time management solutions that improve patient outcomes. The emphasis on R&D is also driving advancements in personalized medicine, allowing for more tailored treatment approaches based on individual genetic and metabolic profiles. This personalized approach aims to optimize treatment efficacy and minimize adverse effects by aligning therapies with each patient's unique needs. The growth in R&D investment is stimulating market innovation and providing patients with access to cutting-edge treatments and technologies. As new breakthroughs and advancements emerge, the diabetes management market in Japan will continue to evolve, offering improved solutions for managing diabetes and enhancing patient care.

## Segmental Insights

### Product Insights

Based on the Product, Continuous Blood Glucose Monitoring Systems (CGMs) are currently the most dominant in the market. CGMs have emerged as a leading solution due to their comprehensive approach to monitoring and managing blood glucose levels in real-time, offering several advantages over traditional methods. CGMs provide continuous, real-time glucose readings by using a small sensor inserted under the skin, which measures glucose levels in the interstitial fluid. This continuous monitoring allows for a more dynamic and detailed picture of glucose fluctuations throughout the day and night, compared to periodic measurements obtained with traditional glucose meters. The ability to track glucose levels in real-time helps patients make more informed decisions regarding their diet, physical activity, and insulin usage, leading



Improved glycemic control and reduced risk of both hypoglycemia and hyperglycemia.

One of the key benefits of CGMs is their ability to provide alerts for both high and low glucose levels. This feature is particularly valuable for individuals with diabetes who may experience unrecognized glucose fluctuations. The alarms and notifications help users take corrective actions before their glucose levels reach critical points, enhancing overall safety and reducing the risk of diabetes-related complications. The real-time data and trend information offered by CGMs also allow healthcare providers to make more precise adjustments to treatment plans, improving the effectiveness of diabetes management. The growing popularity of CGMs in Japan can be attributed to several factors. Advances in technology have made CGMs more accurate, user-friendly, and comfortable to wear. The increasing availability of insurance coverage and financial support for CGMs has made them more accessible to a broader population. The Japanese healthcare system has recognized the benefits of continuous glucose monitoring, and there is a growing emphasis on integrating CGMs into standard diabetes care protocols.

### Type Insights

Based on Type, wearable devices are currently more dominant than handheld devices. Wearable devices, such as continuous glucose monitors (CGMs) and smart insulin pumps, have gained significant traction due to their advanced capabilities and comprehensive approach to managing diabetes. These devices offer several advantages over traditional handheld devices, which primarily include glucose meters and insulin pens.

Wearable devices provide continuous, real-time monitoring of glucose levels, a feature that significantly enhances diabetes management. For instance, CGMs offer ongoing glucose measurements and trends, allowing users to track fluctuations throughout the day and night. This continuous monitoring helps in identifying patterns and making timely adjustments to diet, exercise, and insulin administration. The real-time alerts for high and low glucose levels provided by CGMs also play a crucial role in preventing hypoglycemic and hyperglycemic episodes, improving overall safety and glycemic control. Another key advantage of wearable devices is their ability to seamlessly integrate with other diabetes management technologies and data analytics platforms. For example, data from CGMs can be synced with smartphone apps and cloud-based systems, enabling users and healthcare providers to analyze glucose trends, make informed decisions, and adjust treatment plans accordingly. This

integration facilitates more personalized and proactive diabetes care, which is not as easily achievable with handheld devices alone.

## Regional Insights

Kanto is currently the most dominant in the diabetes management market. This region, which includes major metropolitan areas such as Tokyo, Yokohama, and Chiba, represents a significant portion of the country's healthcare market due to its large population, advanced healthcare infrastructure, and high concentration of medical facilities and specialists.

Kanto's dominance in the diabetes management market can be attributed to several key factors. The region is home to a substantial urban population that benefits from access to cutting-edge healthcare technologies and specialized medical services. Tokyo, as the capital city, serves as a hub for medical innovation and research, attracting leading healthcare providers and technology developers. The presence of numerous hospitals, clinics, and specialized diabetes centers in the Kanto region ensures that residents have access to a wide range of diabetes management solutions, including the latest in diagnostic tools, treatment options, and patient education resources. The high density of healthcare facilities and professionals in Kanto also facilitates better management of diabetes through increased availability of advanced treatment options and support services. The region's medical infrastructure supports the implementation of state-of-the-art diabetes technologies, such as continuous glucose monitors (CGMs), smart insulin pumps, and integrated diabetes management systems. This accessibility to advanced technologies and comprehensive care contributes to improved patient outcomes and higher adoption rates of innovative diabetes management solutions.

The Kanto region benefits from a strong emphasis on public health initiatives and diabetes awareness campaigns. With Tokyo at its center, the region often leads national efforts in promoting diabetes prevention, early detection, and effective management. Public health programs, community outreach, and educational efforts are frequently concentrated in Kanto, helping to raise awareness about diabetes and encourage proactive management among residents. Economic factors also play a significant role in Kanto's dominance in the diabetes management market. The region's economic strength and high average income levels contribute to higher affordability and adoption of advanced diabetes management technologies. Patients in Kanto are more likely to have access to insurance coverage and financial resources that support the use of innovative tools and treatments, further driving market growth in the

area.

Medtronic Japan Co., Ltd.

Chugai Pharmaceutical Co., Ltd.

Bayer Holding Ltd.

Terumo Corporation

Abbott Japan Co., Ltd.

Novo Nordisk Pharma Ltd.

Roche DC Japan KK

Braun Aesculap Japan Co., Ltd.

PHC Corporation

Sanofi K.K.

Report Scope:

In this report, the Japan Diabetes Management Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Japan Diabetes Management Market, By Product:

Continuous Blood Glucose Monitoring System

Smart Insulin Pen

Smart Glucose Meter

Smart Insulin Pumps

Japan Diabetes Management Market, By Type:

Wearable Devices

Handheld Devices

Japan Diabetes Management Market, By End Use:

Hospitals

Home settings

Diagnostic Centers

Japan Diabetes Management Market, By Region:

Hokkaido

Tohoku

Kanto

Chubu

Kansai

Chugoku

Shikoku

Kyushu

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Japan Diabetes Management Market.

Available Customizations:

*Japan Diabetes Management Market, By Product (Continuous Blood Glucose Monitoring System, Smart Insulin Pen, S...*

Japan Diabetes Management Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

Detailed analysis and profiling of additional market players (up to five).

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