

UAE Digital Diabetes Management Market By Product (Smart Glucose Meter, Continuous Blood Glucose Monitoring System, Smart Insulin Pens, Smart Insulin Pumps/Closed Loop Systems Apps), By Type (Wearable Devices and Handheld Devices), By Region, Competition, Forecast and Opportunities, 2020-2030F

<https://marketpublishers.com/r/U92BC715AB75EN.html>

Date: January 2025

Pages: 82

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

ID: U92BC715AB75EN

Abstracts

UAE Digital Diabetes Management Market was valued at USD 71.88 Million in 2024 and is expected to reach USD 117.22 Million with a CAGR of 8.45% through 2030. The UAE Digital Diabetes Management Market is experiencing significant growth, driven by a combination of health, technological, and policy factors. The rising prevalence of diabetes in the UAE, influenced by sedentary lifestyles, poor dietary habits, and genetic predispositions, has created a strong demand for more effective disease management solutions. Diabetes is rapidly increasing worldwide, with the Middle East and Africa witnessing a particularly concerning surge. The International Diabetes Federation (IDF) predicts that the Middle East and North Africa will see a 110% rise in diabetes cases, while Africa is expected to experience a 156% increase by 2045. Digital tools, such as mobile health apps, wearable devices, and telemedicine platforms, provide patients with real-time monitoring and personalized care, improving disease outcomes and reducing healthcare costs. The UAE's government plays a crucial role, promoting innovation through the National Agenda for Sustainable Health and investments in healthcare infrastructure. These policies encourage the integration of digital health solutions into the healthcare system. An increasing awareness of the benefits of self-management tools and the growing trend of health-consciousness among the population have led to a rising adoption of digital diabetes management tools. Collaborations between healthcare providers and technology companies further enhance the development of sophisticated, user-friendly platforms that empower patients to take control of their

condition. Collectively, these factors are shaping the future of diabetes care in the UAE.

Key Market Drivers

Increasing Prevalence of Diabetes

The International Diabetes Federation (IDF) reports that the diabetes prevalence in the UAE is 16.3%, compared to 9.3% globally. Recent studies have shown an even higher prevalence of diabetes mellitus, reaching 25.1% among UAE nationals in the Northern Emirates and 19.1% among expatriates. The rising prevalence of diabetes in the UAE is one of the key drivers of the digital diabetes management market. Factors such as rapid urbanization, sedentary lifestyles, unhealthy dietary habits, and an aging population have contributed to the growing incidence of type 2 diabetes. This creates an urgent demand for effective, personalized, and accessible solutions for diabetes management. Digital tools, such as mobile apps, remote monitoring systems, and wearables, provide a cost-effective way for patients to manage their blood sugar levels, track their diet and exercise, and receive real-time insights into their health. Digital platforms help healthcare professionals to offer timely interventions, ensuring better disease management. As diabetes continues to rise in the country, these digital solutions are becoming indispensable in helping people live healthier lives and managing their condition more effectively.

Rising Health Awareness and Adoption of Digital Health Solutions

As health awareness increases in the UAE, more individuals are actively seeking ways to manage their diabetes effectively. The growing focus on health and wellness among the UAE population, driven by the government's public health campaigns and initiatives, has led to a rise in the adoption of digital health solutions. Patients are increasingly aware of the benefits of tracking their health metrics, such as blood glucose levels, heart rate, and physical activity, through digital tools. This increased awareness and interest in self-management tools have led to higher demand for mobile health apps, wearables, and telemedicine services. The younger, tech-savvy generation is more inclined to adopt digital health solutions, pushing the market forward. As people become more proactive about their health, digital diabetes management tools offer a convenient and efficient means of staying on top of their condition, making them a crucial part of the modern healthcare landscape in the UAE.

Rise of Personalized Healthcare

Personalized healthcare, which tailors treatment and management plans to an individual's specific needs and characteristics, is a growing trend in the UAE. Diabetes management, in particular, benefits greatly from this approach, as each patient's response to medication, diet, and exercise can vary. Digital diabetes management tools provide a level of customization that enables healthcare professionals to offer more precise and individualized care. Through data analytics and AI, digital platforms can monitor real-time health parameters, analyze trends, and make personalized recommendations to improve diabetes control. These solutions allow patients to receive guidance on meal planning, exercise routines, and medication adjustments based on their unique health profiles. This shift toward personalized healthcare is not only improving patient outcomes but also increasing the demand for digital diabetes management tools that provide tailored care.

Increased Demand for Remote Monitoring and Telemedicine

The COVID-19 pandemic has accelerated the shift toward remote healthcare services, including telemedicine and remote patient monitoring, which has had a lasting impact on the digital diabetes management market in the UAE. With the need for social distancing and reduced in-person visits, patients and healthcare providers have turned to digital tools for managing diabetes. Remote glucose monitoring devices, such as continuous glucose monitors (CGMs), paired with telemedicine consultations, allow patients to receive continuous support without leaving their homes. These solutions have proven to be particularly beneficial for elderly patients or those with mobility challenges, enabling them to manage their condition more easily. As the demand for remote healthcare solutions continues to rise, telemedicine platforms and remote monitoring tools will remain integral to the management of diabetes in the UAE, ensuring more patients have access to effective care regardless of location.

Partnerships Between Healthcare Providers and Technology Companies

Collaboration between healthcare providers and technology companies is another driver of the UAE digital diabetes management market. These partnerships facilitate the development of advanced, user-friendly digital health solutions tailored to the needs of diabetes patients. Healthcare providers bring in-depth medical expertise, while technology companies contribute cutting-edge innovations in app development, AI, and wearable devices. This collaboration leads to the creation of comprehensive, data-driven platforms that offer personalized diabetes management. Such partnerships enable the integration of these tools into the broader healthcare ecosystem, ensuring

that data is easily accessible to both patients and healthcare professionals. As the demand for digital health solutions grows, these collaborations will continue to play a critical role in improving diabetes care in the UAE, making it more efficient and accessible.

Key Market Challenges

Data Privacy and Security Concerns

One of the primary challenges facing the UAE Digital Diabetes Management Market is the issue of data privacy and security. Digital health solutions, such as mobile apps, wearables, and telemedicine platforms, rely heavily on collecting and processing personal health data, including glucose levels, heart rates, and other vital health parameters. This data is often stored in the cloud or shared across various platforms and devices, creating potential vulnerabilities in terms of unauthorized access or cyberattacks. As the UAE's healthcare system moves toward digitalization, ensuring robust cybersecurity measures to protect sensitive patient data is of paramount importance. The rapid rise in cybercrimes and data breaches globally has heightened concerns among patients and healthcare providers, particularly regarding the potential misuse of private health information. Despite the increasing adoption of encryption technologies and secure data storage practices, many patients remain hesitant to share their personal health data due to privacy concerns. In response, both regulatory bodies and healthcare providers in the UAE must invest in advanced security protocols, data encryption, and compliance with international data protection regulations, such as the General Data Protection Regulation (GDPR) in Europe or similar local frameworks. Ensuring that patient information remains secure is critical for the growth of digital health solutions and to build public trust in these tools.

Limited Access to Digital Infrastructure

Another significant challenge is the limited access to digital infrastructure, particularly in remote or rural areas of the UAE. While urban centers like Dubai and Abu Dhabi boast cutting-edge healthcare infrastructure and easy access to digital health solutions, the situation is less favorable in more isolated regions of the country. Access to reliable internet, smartphones, and advanced digital health tools may be limited for certain populations, especially among older adults and lower-income groups. This digital divide creates disparities in the ability to benefit from digital diabetes management solutions, as patients in these areas may struggle to access the necessary technology or may be less familiar with how to use digital health tools effectively. Digital literacy levels can

vary significantly across demographics, posing a barrier to the widespread adoption of these solutions. To overcome this challenge, there needs to be a concerted effort to bridge the infrastructure gap. This could involve expanding internet access in underserved areas, offering subsidies for digital health devices, and providing training programs for patients and healthcare professionals to improve digital literacy. Addressing these issues will ensure that all residents, regardless of location or income, can take advantage of digital solutions for managing diabetes.

Key Market Trends

Government Support and Initiatives

The UAE government plays a pivotal role in driving the digital diabetes management market through its various healthcare initiatives and investments. The UAE's National Agenda for Sustainable Health 2031 emphasizes the importance of enhancing healthcare services through innovative solutions, including digital technologies. As part of this vision, the government has committed to modernizing healthcare infrastructure and increasing the use of e-health solutions to improve patient outcomes and access to care. The UAE Ministry of Health and Prevention (MOHAP) is actively promoting the integration of digital health technologies in diabetes care by encouraging partnerships between healthcare providers, technology firms, and research institutions. In November 2024, The Ministry of Health and Prevention (MoHAP) has exceeded its early diabetes detection target by conducting over 150,000 screenings nationwide, surpassing the initial goal of 100,000 set under the Government Accelerators program. This achievement, part of the National Prediabetes and Diabetes Screening Campaign launched in October 2023, highlights the Ministry's dedication to early type 2 diabetes detection, strengthening prevention initiatives, and supporting the national objective to reduce diabetes prevalence in the UAE. Coinciding with World Diabetes Day on November 14th, this milestone also marks the completion of the campaign's second phase, a year-long initiative backed by all UAE health authorities and in collaboration with Merck Gulf.

The Dubai Health Authority (DHA) has rolled out several initiatives to foster the adoption of telemedicine, health apps, and other digital solutions, making diabetes management more accessible and efficient for residents. This strong governmental backing creates an ideal environment for the growth of digital diabetes management tools, ensuring their widespread adoption across the country.

Advancements in Digital Health Technologies

Technological advancements have significantly contributed to the growth of the UAE digital diabetes management market. Innovations in mobile health apps, artificial intelligence (AI), machine learning, wearable devices, and telemedicine platforms are transforming how diabetes is managed. Wearables, such as continuous glucose monitors (CGMs) and smart insulin pens, allow patients to monitor their glucose levels in real time, enabling them to make more informed decisions about their health. GluCare Integrated Diabetes Center, the world's first healthcare provider to integrate Remote Continuous Data Monitoring into its standard care model, is now also the first to offer this service to juvenile diabetes patients and their families. Opened in late 2020 and located on Dubai's Al Wasl Road, GluCare is now welcoming young patients, ranging from infants to teenagers, with both Type-1 and Type-2 diabetes. This new service also marks the first use of Digital Therapeutics (DTx) in the MENA region for the care of youth and children. AI-powered apps provide personalized recommendations based on data analytics, helping individuals better manage their diet, exercise, and medication. Telemedicine platforms enable remote consultations with healthcare professionals, reducing the need for in-person visits while ensuring timely advice and support. These technologies enhance patient engagement, improve adherence to treatment regimens, and ultimately contribute to better health outcomes. As these technologies evolve and become more integrated into the healthcare ecosystem, their impact on diabetes management will continue to grow.

Segmental Insights

Product Insights

Based on the Product, Continuous Blood Glucose Monitoring Systems (CGMs) currently dominate the market, with the Smart Glucose Meter also holding significant market share. However, CGMs have gained substantial traction due to their advanced capabilities, continuous monitoring features, and ability to provide real-time glucose data, which is essential for effective diabetes management. CGMs are a groundbreaking innovation in diabetes care, offering patients a continuous stream of data about their glucose levels throughout the day and night. Unlike traditional glucose meters, which require users to test their blood sugar levels at specific intervals, CGMs continuously monitor glucose levels through a small sensor inserted just under the skin. The device then sends this data wirelessly to a mobile app or a receiver, allowing users to track fluctuations in their blood sugar in real-time. This enables users to make immediate adjustments to their diet, insulin doses, or physical activity, helping them manage their condition more effectively. As diabetes prevalence continues to rise in the

UAE, patients and healthcare professionals increasingly recognize the benefits of continuous monitoring, making CGMs the preferred choice for many.

The UAE's growing adoption of CGMs is also driven by the increasing awareness of their advantages over traditional glucose meters. Traditional devices are limited to offering a snapshot of blood glucose levels at a single point in time, which can sometimes be insufficient for effective diabetes management. CGMs, on the other hand, offer real-time, dynamic data that helps patients make more informed decisions and reduce the risk of dangerous blood sugar fluctuations, including both hypoglycemia (low blood sugar) and hyperglycemia (high blood sugar). This real-time data is especially beneficial for individuals with Type 1 diabetes, who require more precise insulin management, as well as for those with Type 2 diabetes aiming for tighter control over their glucose levels.

Type Insights

Based on the Type, Wearable Devices are currently dominating, driven by their advanced capabilities, convenience, and increasing consumer preference for non-invasive, continuous health monitoring solutions. Wearable devices, such as Continuous Glucose Monitors (CGMs) and other fitness trackers that monitor blood glucose levels, heart rate, physical activity, and other key health metrics, have become integral to diabetes management. Their popularity is growing due to their ability to provide continuous, real-time data, which empowers patients to make timely adjustments to their diabetes care regimen.

Wearable devices, especially CGMs, offer a significant advantage over handheld devices because they allow for continuous, passive monitoring of blood glucose levels throughout the day and night. Traditional handheld glucose meters require users to manually test their blood sugar at specific intervals, which can be inconvenient and sometimes inaccurate due to the episodic nature of the testing. In contrast, CGMs deliver a steady stream of glucose data, alerting users to fluctuations in real-time, such as a drop in glucose levels that may indicate hypoglycemia, or a spike that may indicate hyperglycemia. This immediate feedback helps users make informed decisions about their diet, insulin doses, or exercise, offering a more effective way to manage diabetes on a day-to-day basis. The appeal of wearable devices in the UAE is also attributed to their integration with smartphones and mobile applications. These devices often sync with apps that track trends in glucose levels, physical activity, food intake, and even medication adherence. Such integration provides a more comprehensive and holistic approach to managing diabetes, offering both patients and healthcare providers better

visibility into the patient's overall health. This connectivity is crucial in a healthcare system like the UAE's, where the demand for smart, efficient healthcare solutions is on the rise.

Regional Insights

In the UAE, Dubai is currently the dominant region in the Digital Diabetes Management Market, outpacing other emirates like Abu Dhabi and Sharjah due to its advanced healthcare infrastructure, a high concentration of tech-savvy residents, and strong government initiatives aimed at integrating digital health solutions into the healthcare system. Dubai's leadership in digital health adoption is influenced by several factors, including the emirate's status as a global hub for innovation, its strategic position as a leader in health technology, and its emphasis on health and wellness as part of its broader vision for the future.

Dubai has made significant strides in incorporating digital health technologies, such as mobile health apps, Continuous Glucose Monitoring (CGM) systems, wearable devices, and telemedicine platforms into its healthcare ecosystem. The city's healthcare sector is known for being at the forefront of adopting cutting-edge technologies, and this extends to the management of chronic diseases like diabetes. The Dubai Health Authority (DHA) has launched several initiatives that prioritize eHealth, aiming to improve healthcare delivery and accessibility through the use of digital tools. The city's push toward digital health solutions, backed by government incentives, makes it a highly favorable environment for both patients and healthcare providers to embrace digital diabetes management technologies.

Key Market Players

Johnson & Johnson Middle East FZ LLC

Abbott Laboratories S.A.

Medtronic META FZ-LLC

Roche Diagnostics Middle East FZCO

Bayer Middle East FZE

Sanofi Aventis Gulf FZE

Gulf Pharmaceutical Industries (Julphar)

Novo Nordisk Pharma Gulf FZE

Merck Serono Middle East FZ-Ltd

Terumo Middle East FZE

Report Scope:

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

UAE Digital Diabetes Management Market, By Product:

Smart Glucose Meter

Continuous Blood Glucose Monitoring System

Smart Insulin Pens

Smart Insulin Pumps/Closed Loop Systems Apps

UAE Digital Diabetes Management Market, By Type:

Wearable Devices

Handheld Devices

UAE Digital Diabetes Management Market, By Region:

Abu Dhabi

Dubai

Sharjah

Rest of UAE

Competitive Landscape

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

Available Customizations:

UAE Digital 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validations
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. UAE DIGITAL DIABETES MANAGEMENT MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Smart Glucose Meter, Continuous Blood Glucose Monitoring System, Smart Insulin Pens, Smart Insulin Pumps/Closed Loop Systems Apps)
 - 5.2.2. By Type (Wearable Devices and Handheld Devices)
 - 5.2.3. By Region

- 5.2.4. By Company (2024)
- 5.3. Market Map

6. DUBAI DIGITAL DIABETES MANAGEMENT MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Product
 - 6.2.2. By Type

7. ABU DHABI DIGITAL DIABETES MANAGEMENT MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product
 - 7.2.2. By Type

8. SHARJAH DIGITAL DIABETES MANAGEMENT MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Product
 - 8.2.2. By Type

9. MARKET DYNAMICS

- 9.1. Drivers
- 9.2. Challenges

10. MARKET TRENDS & DEVELOPMENTS

- 10.1. Merger & Acquisition (If Any)
- 10.2. Product Launches (If Any)
- 10.3. Recent Developments

11. POLICY & REGULATORY LANDSCAPE

12. UAE ECONOMIC PROFILE

13. PORTER'S FIVE FORCES ANALYSIS

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Products

14. COMPETITIVE LANDSCAPE

- 14.1. Johnson & Johnson Middle East FZ LLC
 - 14.1.1. Business Overview
 - 14.1.2. Company Snapshot
 - 14.1.3. Products & Services
 - 14.1.4. Financials (As Reported)
 - 14.1.5. Recent Developments
 - 14.1.6. Key Personnel Details
 - 14.1.7. SWOT Analysis
- 14.2. Abbott Laboratories S.A.
- 14.3. Medtronic META FZ-LLC
- 14.4. Roche Diagnostics Middle East FZCO
- 14.5. Bayer Middle East FZE
- 14.6. Sanofi Aventis Gulf FZE
- 14.7. Gulf Pharmaceutical Industries (Julphar)
- 14.8. Novo Nordisk Pharma Gulf FZE
- 14.9. Merck Serono Middle East FZ-Ltd
- 14.10. Terumo Middle East FZE

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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