

South & Central America Continuous Glucose Monitoring Device (CGMD) Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product (Sensors, Transmitters, and Receivers), Application (Type 1 Diabetes and Type 2 Diabetes), Testing Sites (Fingertip Testing and Alternate Site Testing), and End User (Hospitals and Clinics and Self or Homecare)

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Abstracts

The South & Central America Continuous Glucose Monitoring Device (CGMD) Market is projected to grow significantly, reaching an estimated US\$ 2,334.3 million by 2031, up from US\$ 931.1 million in 2024, reflecting a robust compound annual growth rate (CAGR) of 14.2% from 2025 to 2031. This growth is driven by the increasing prevalence of diabetes in the region, which currently affects approximately 35 million adults, or 1 in 10 adults, according to the International Diabetes Federation (IDF) 2024 report.

The market is segmented into key countries including Brazil, Argentina, Peru, Chile, Colombia, and the Rest of South & Central America. Brazil, in particular, plays a pivotal role in the CGM landscape, benefiting from a universal healthcare system (SUS) that provides comprehensive coverage. However, access to CGMs remains limited, primarily available through private pay or legal action due to insufficient public coverage. As diabetes rates continue to rise, there is a pressing need for effective real-time glucose monitoring tools.

Recent regulatory developments in Brazil indicate a shift towards broader access to CGMs. The Ministry of Health has initiated a public consultation process to explore the

integration of CGMs into SUS, while various state lawmakers are advocating for the free distribution of these devices. This political momentum is crucial for improving access to CGMs, which are currently underutilized; for instance, a study in Mexico revealed that only 9% of individuals with type 1 diabetes use CGMs, a trend mirrored in Brazil where many patients rely on basic insulin therapies.

Despite these challenges, there are positive developments in the region. Partnerships between public and private sectors are emerging, with companies like Abbott and Dexcom integrating their CGM systems into Brazil's digital health frameworks. Additionally, new reimbursement codes and telehealth initiatives in Argentina and Colombia are expanding access to diabetes care, both in hospitals and at home. Local innovation is also on the rise, with a Brazilian startup developing a cost-effective, minimally invasive CGM tailored to the needs of Latin American populations.

However, the market faces challenges related to the over-the-counter availability of CGMs, which raises concerns about counterfeit products and misuse. Insurers and ethics bodies warn that without proper guidance and interoperability, the risks associated with unapproved device combinations could pose significant health threats.

The CGMD market is segmented by product type, application, testing sites, and end users. In 2024, sensors dominated the product segment, while type 2 diabetes accounted for the largest share of applications. Fingertip testing was the most common testing site, and self/homecare emerged as the leading end-user segment.

A notable trend in the CGM market is the integration of CGM systems with insulin delivery technologies and artificial intelligence (AI) tools, which are transforming diabetes management. This shift is moving towards proactive, semi-automated, and eventually closed-loop systems. Hybrid closed-loop insulin delivery systems, such as those developed by Tandem Diabetes Care and Medtronic, utilize real-time CGM data to automatically adjust insulin delivery, significantly improving glycemic control and reducing hypoglycemia incidents.

In 2024, Dexcom's G7 was fully integrated into insulin delivery systems, enhancing user experience with easier sensor insertion and smartphone connectivity. The interoperability of CGMs with insulin pumps is rapidly advancing, facilitated by Bluetooth Low Energy (BLE) standards and secure APIs, which allow for broader compatibility across devices. Additionally, smart insulin pens are being developed to sync with CGM apps, providing better dosing recommendations based on real-time data.

AI is increasingly being incorporated into CGM devices and mobile applications, enhancing decision-making for users and healthcare providers. Applications like Dexcom Clarity and Sugarmate analyze glucose patterns to provide personalized alerts and trend forecasts, enabling users to anticipate and manage hyperglycemia or hypoglycemia events effectively. This integration of AI not only improves clinical outcomes but also reduces the cognitive burden on patients by automating insulin adjustments and supporting real-time decision-making.

The South & Central America CGMD market is characterized by significant players such as Abbott Laboratories, Medtronic, F. Hoffmann-La Roche, Tandem Diabetes Care, and Dexcom, among others. These companies are actively pursuing strategies such as product innovation, market expansion, and mergers and acquisitions to enhance their market presence and offer advanced solutions to consumers.

In summary, the South & Central America Continuous Glucose Monitoring Device market is poised for substantial growth, driven by increasing diabetes prevalence, regulatory advancements, and technological innovations. The integration of CGMs with insulin delivery systems and AI tools represents a transformative trend that promises to enhance diabetes management and improve patient outcomes across the region.

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