Global Diabetes Care Devices Market Outlook: 2015-2020

Description:

Diabetes is a chronic condition associated with abnormally high level of sugar (glucose) in the blood. Diabetes currently affects 386 million people worldwide and is expected to increase to 592 million people by 2035. The diabetes prevalence is growing with rising obesity rates, lifestyle and dietary changes, and growing ageing population. Therefore, given the huge numbers of diabetics worldwide and the financial implications due to diabetes, there is a substantial business potential in the diabetes care devices market.

The global diabetes care devices market is expected to grow at a CAGR of 5.2% from 2015 to 2020 to reach $24.6 billion by 2020. This market is mainly driven by increasing prevalence of diabetes, technological advancements, rise in obese population, sedentary lifestyle and improper diet, and increasing need for faster and safer diagnosis and treatment of diabetes. Furthermore, huge investments by the market leaders and foraying of new companies into this market, wide scope of penetration in untapped and emerging markets, and rising awareness among people about diabetes care are also accelerating the growth of this market. However, high cost associated with diagnosis and treatment, reimbursement issues for new technologies, lack of awareness, strict regulatory obligations, and high cost of diabetic food hinders the growth of this market to some extent.

The research report on the diabetes care devices market provides comprehensive analysis of the global market with a country level analysis and helps in understanding the driving forces for the growth of this market. The report also provides analysis of major product segments such as diabetes control solutions, diabetes monitoring devices, and insulin delivery devices. The diabetes monitoring devices segment further sub-segmented into continuous blood glucose monitoring devices, test strips, lancets, and hemoglobin A1c (HbA1c) testing kits. The insulin delivery devices further sub-segmented into insulin syringes, insulin pens, insulin pumps, and insulin injectors.

Geographically, the global diabetes care devices market has been segmented into North America, Europe, Asia-Pacific, and Rest of the World (RoW). The North America held the largest share in the global diabetes care products market followed by Europe and Asia-Pacific. The Asia-Pacific region provides significant opportunities for the diabetes care with China and India being the most populous countries in this region contributing to the increased demand for diabetes care devices like blood glucose monitoring devices and insulin delivery devices. China is home to the world's largest population with close to 1.4 billion inhabitants followed by India with approximately 1.2 billion people in 2014. According to the International Diabetes Federation, China had the largest number of diabetic patients with around 96.2 million diabetic patients followed by India with around 66.8 million diabetic patients in 2014. This represents a sizeable chunk of approximately 40-45% of the global diabetic population living in India and China which provides significant opportunities for the global diabetes care devices companies to invest in this region. As a result, many players in this market are focusing on strengthening their position in this region.

The global diabetes care devices market is mainly dominated by Roche Diagnostics with its Accu Chek line of products and followed by Johnson & Johnson with its subsidiaries LifeScan, Inc. and Animas Corporation having robust portfolio of diabetes care products such as OneTouch Ultramini, Animas Vibe, and Onetouch Verio in 2014. Novo Nordisk and Eli Lilly and Company have been the market leaders in insulin delivery devices market, especially in insulin pens. Along with Roche and Johnson and Johnson, Bayer AG and Abbott Laboratories also has a strong presence in the growing markets for diabetes care devices such as India and China with Bayer AG contributing 5-10% share in the Indian diabetes care devices market in 2014. The other key players in the global diabetes care devices market are, Ypsomed AG, Medtronic plc, Becton, Dickinson and Company, Acon Laboratories, Inc., Alere Inc., ARKRAY Inc., Terumo Corporation, Dexcom, Inc. (U.S.), Siemens AG, Tandem Diabetes Care, Inc., Owen Mumford Ltd., and Sanofi S.A.

Contents:

1 Introduction to Diabetes Care Devices Market
   1.1 Diabetes Care Devices Market Ecosystem
   1.2 Report Elucidation
   1.3 Market Buzz and Foreground
   1.4 Research Methodology
       1.4.1 Secondary Research
1.4.2 Primary Research
1.4.3 Market Analytics

2 Executive Summary

3 Market Insights
3.1 Key Drivers
3.2 Key Restraints
3.3 Issues and Opportunities
3.4 Reimbursement Scenario
3.5 Market Share Analysis
3.6 Market Trends

4 Global Diabetes Care Devices- Market Crackdown ($ Value Analysis), By Product Type
4.1 Diabetes control Solutions
4.2 Diabetes Monitoring Devices
4.2.1 Continuous Blood Glucose Monitoring Devices
4.2.2 Test Strips
4.2.3 Lancets
4.2.4 Hemoglobin A1c Testing Kits
4.2.5 Others
4.3 Insulin Delivery Devices Market
4.3.1 Insulin Syringes
4.3.2 Insulin Pens
4.3.3 Insulin Pumps
4.3.4 Insulin Jet Injectors
4.3.5 Insulin Inhaler

5 Diabetes Care Devices- Market Crackdown ($ Value Analysis), By Geography
5.1 North America
5.1.1 U.S.
5.1.2 Canada
5.2 Europe
5.2.1 Germany
5.2.2 France
5.2.3 U.K.
5.2.4 Italy
5.2.5 Spain
5.2.6 Russia
5.2.7 RoE
5.3 Asia-Pacific
5.3.1 China
5.3.2 India
5.3.3 Japan
5.3.4 RoA
5.4 RoW
5.4.1 Latin America
5.4.2 Middle East & Africa

6 Global Diabetes Care Devices Market- Competitive Landscape
6.1 Agreements and Partnerships
6.2 Mergers and Acquisitions
6.3 New Product Launches
6.4 Expansions
6.5 Other Developments

7 Company Profiles
7.1 Abbott Laboratories
7.2 Bayer HealthCare AG
7.3 Eli Lilly and Company
7.4 F. Hoffmann-La Roche Ltd.
7.5 Johnson & Johnson
7.6 Medtronic, Inc.
7.7 Novo Nordisk A/S
7.8 Ypsomed AG
7.9 Becton, Dickinson and Company
7.10 ARKRAY Inc.
7.11 Terumo Corporation
7.12 Dexcom, Inc.
7.13 Tandem Diabetes Care, Inc
7.14 Sanofi S.A.

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