

## **Germany Diabetes Care Devices Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 90 pages | Mordor Intelligence

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### **Report description:**

The German diabetes care devices market was valued at more than 5.4 billion in 2021, and it is expected to reach more than USD 8 billion by 2027, registering a CAGR of more than 7% during 2022- 2027.

The COVID-19 pandemic has substantially impacted the diabetes care devices market. The prevalence of diabetes in people hospitalized with COVID-19 infection and the evidence that improved glycemic control might improve outcomes and reduce the length of stay in patients with SARS-CoV-2 have underlined the importance of diabetes care devices.

The pandemic also highlighted opportunities for continuing and expanding innovations in the delivery of diabetes care, through virtual consultations between healthcare providers and people with diabetes, and the use of diabetes technology. Crisis management has created unprecedented interest in remote care from both patients and providers and removed many long-standing regulatory barriers.

Germany is one of the developed countries and advanced in terms of healthcare facilities. Technologies, such as continuous glucose monitoring and insulin infusion pumps, are getting more adopted rapidly in Germany than the other developing countries. Moreover, the reimbursement policy and the pricing policy are highly regulated, which drives the market and increases the adoption rate of new and advanced technologies. The roll-out of many new products, increasing international research collaborations in technology advancement, and increasing awareness about diabetes among the people are some of the market opportunities for the players in the German diabetes care device market.

Germany Diabetes Care Devices Market Trends

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## Monitoring Devices Segment Occupied the Highest Market Share in the German Diabetes Care Devices Market in 2021

Monitoring devices include self-monitoring blood glucose devices (SMBG) and continuous glucose monitoring devices (CGM), where SMBG devices held the highest share in 2021, with a revenue of USD 4.4 billion in the German diabetes care devices market.

Diabetes is a significant health problem and one of the astounding challenges for healthcare systems all over Germany. The prevalence of known type 1 & 2 diabetes in the German adult population is very high along with a high number of patients who are not yet diagnosed with the disease. Due to an aging population and unhealthy lifestyle, the prevalence of type 2 diabetes is expected to increase steadily over the next few years. High-quality care, including adequate monitoring, control of risk factors, and active self-management are the key factors for preventing complications in German patients with type 2 diabetes.

The frequency of monitoring glucose levels depends on the type of diabetes, which varies from patient to patient. Type-1 diabetic patients need to check their blood glucose levels at regular intervals, monitor their blood glucose levels, and adjust the insulin dosing accordingly. Therefore, if a patient performs 5-6 tests in a day, the average expenditure on test strips may be more than USD 100/month. These expenses add to the already high costs of diabetes management, and they are adding to the market growth. The current CGM devices show a detailed representation of blood glucose patterns and tendencies compared to a routine check of glucose levels at set intervals. Continuous glucose monitoring has become a popular alternative to the portable finger-prick glucometers available in the market for the convenience of diabetic patients. Continuous glucose monitoring devices are becoming cheaper with the advent of new technologies, like cell phone integration, which is likely to drive the segment growth during the forecast period.

Stringent government policies and favorable regulations by WHO in Germany regarding usage of blood glucose monitoring devices are encouraging companies to develop innovative products. Penetration of remote patient monitoring devices in the German market supports local clinical research organizations (CROs) in their clinical research trials and ensures ease of monitoring, which facilitates discovery process.

Thus, owing to the above-mentioned factors it is expected to drive the segment growth over the forecast period.

## Disposable Insulin Pens Hold the Highest Market Share Among Insulin Delivery Devices

Insulin disposable pens are the most widely used devices for the administration of insulin in Germany. This sub-segment occupies more than 47% of the share in the management devices segment and around 6% of the market share in the whole German diabetes care devices market.

According to the German Diabetes Centre (DDZ), at least 7.2% of the population in Germany currently lives with diabetes which will increase significantly over the next two decades. German law requires public plans to cap out-of-pocket health care costs and to cover all medically necessary treatment, including insulin. German diabetes patients have some of the lowest out-of-pocket costs in the world for insulin, according to T1 International, an advocacy group for people with type 1 diabetes.

Insulin cartridges in reusable pens are known to be a needed extension to insulin pens. These devices are an upgraded version of the insulin vials. Most types of insulins are manufactured in the form of cartridges, thus, making them easily accessible. These devices have all the functional benefits of reusable pens and are cost-effective, as these cartridges are less expensive compared to disposable insulin pens. Due to the increasing demand for insulin cartridges, most insulin device manufacturing companies have produced reusable insulin pens that are compatible with various insulin manufacturers' cartridges. These insulin cartridges are more socially friendly, as they are smaller and less noticeable than the classic vial-and-syringe. They are also more portable for consumers on the go. Cartridges that are open do not need to be refrigerated, thus, making the storage very easy for

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consumers. Therefore, using cartridges is the most cost-effective way to use insulin, as reusable pens are a one-time investment, unlike disposable pens.

## Germany Diabetes Care Devices Market Competitor Analysis

The German diabetes care devices market is fragmented. There have been constant innovations driven by manufacturers to compete in the market. The major players, such as Abbott and Medtronic while adhering to organic growth strategies are working on various technological advancements which are evident from the R&D spending of these companies. The manufacturers of insulin delivery devices are spending a massive amount on the R&D of the devices. For instance, Abbott in June 2022 announced that it's developing a new bio-wearable that will continuously monitor glucose and ketone levels in one sensor.

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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