

Germany Diabetes Care Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2018 - 2029

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Germany Diabetes Care Devices Market size is estimated at USD 2.27 billion in 2024, and is expected to reach USD 3.05 billion by 2029, growing at a CAGR of 6.07% during the forecast period (2024-2029).

The COVID-19 pandemic highlighted that substantially greater attention had to be given to diabetes to avoid unnecessary and inequitable outcomes from the infection. According to an article titled "Incidence of newly diagnosed diabetes after COVID-19," published in *Diabetologia* 2022, the human pancreas could also be a target of SARS-CoV-2. Following a COVID-19 infection, reduced insulin secretory granules in beta cells and impaired glucose-stimulated insulin secretion were observed. In addition, after the pandemic, some patients developed insulin resistance and had elevated blood glucose levels, although they had no previous history of diabetes.

Unusually high or low blood glucose levels can potentially lead to acute and or chronic, life-threatening conditions. Managing diabetes to improve patient outcomes requires a complex multidisciplinary approach. Appropriate and timely blood glucose monitoring allows the successful management of out-of-range blood glucose levels, minimizing diabetic-related health complications. Diabetes can be considered a data management disease and an example of real-world health and treatment data acquisition to inform integrated and personalized chronic disease management. Both patients and diabetes care providers continuously collect metabolic, treatment, and lifestyle data in joint decision-making on treatment-digital health technologies, including digital health applications, support diabetes self-management.

The vast range of apps in the diabetes field supports the adoption of lifestyle interventions for the prevention and management of diabetes, the evaluation of blood glucose control quality, and the dosing of insulin. Integrating blood glucose monitoring with insulin calculators, automated insulin titration software, and remote coaching are further developments that provide patients with

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

poorly controlled diabetes additional support needed to improve critical outcomes, enhancing market prospects in future years.

Germany Diabetes Care Devices Market Trends

Rising Diabetes Prevalence in Germany is driving the market in forecast period.

According to the German Diabetes Centre (DDZ), about 8.5 million people in Germany are affected by diabetes. The number of people with Type 2 diabetes in Germany will continue to increase over the next twenty years. Researchers at DDZ estimate that up to twelve million people might suffer from metabolic disorders in 2040.

According to the European Observatory on Health Systems and Policies 2021, Germany has the world's oldest social health insurance (SHI) system. Health insurance is compulsory. People with an income above a fixed threshold or belonging to a particular professional group can opt out of SHI coverage and enroll in private health insurance (PHI). About 11% of the population is covered by PHI and 89 % by SHI. Although coverage is universal for all legal residents, only 0.1% of the population does not have health insurance.

Technological advancements in insulin delivery devices have increased for safer and more accurate insulin administration. In April 2021, Medtronic introduced the Medtronic Extended infusion set in selected European countries as the first and only infusion set that can be worn for up to 7 days. An infusion set is a tubing that delivers insulin from the pump to the body and typically requires a set change every few days. This innovation doubles the length of time an infusion set can be worn so users can safely stay on insulin pump therapy with fewer interruptions and insertions while introducing enhanced convenience and comfort to their diabetes management routine. The set is compatible with all MiniMed 600 and 700 series insulin pumps.

German diabetes patients have some of the lowest out-of-pocket costs in the world, according to T1 International, an advocacy group for people with diabetes. Stringent government policies and favorable regulations by WHO in Germany are encouraging companies to develop innovative products. Penetration of these products in the German market supports local clinical research organizations in their clinical research trials and ensures ease of management, facilitating the discovery process.

Therefore, the market is anticipated to grow over the analysis period due to rising prevalence and the aforementioned factors.

The Self-monitoring Blood Glucose Segment Holds the Highest Market Share in the Current Year

The self-monitoring blood glucose segment occupies the highest market share of about 38.7% in the current year.

Self-monitoring has streamlined regular blood testing to assess one's diabetes control and inform changes to enhance control. With diabetes being related to the body's ineffective use of insulin, the disease has a high incidence rate, broad pathogenic factors, various complications, and difficulty in curing and causing other lethal hazards to human health. Traction for easy-to-use blood glucose devices has increased and is essential to prevent or detect hypoglycemia and hyperglycemia. Several technological advances have pushed manufacturers to introduce meters that are less painful and invasive at the time of testing and can provide robust and rapid testing with alternative-site testing and a smaller sample size, thereby enhancing the market prospects in the years to come.

Various innovations in lancing devices offer a convenient way to draw blood samples, such as Accu-Chek FastClix, which has a preloaded lancet drum, so a person can load six lancets at a time rather than replacing the lancets after every use. The Accu-Chek FastClix also has a lever and a counter, so the user can easily move to the next lancet and see how many are left in the drum. Accu-Chek states that this model has 11 depth settings. There is also a locking system to prevent lancing accidents. The Accu-Chek FastClix comes with 102 lancets.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Technological advancements in blood glucose meters, including cellular-connected devices that automatically upload SMBG data to secure cloud-based databases, allow for improved sharing and monitoring of SMBG data. Real-time monitoring of SMBG data presents opportunities to provide timely support to patients responding to abnormal SMBG recordings. Such advantages can provide patients with poorly controlled T2D additional support needed to improve critical outcomes, thereby enhancing the market prospects in future years.

Germany Diabetes Care Devices Industry Overview

The German diabetes care devices market is fragmented. Manufacturers have driven constant innovations 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, in June 2022, Abbott announced that it is 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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
- 4.3 Market Restraints
- 4.4 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.4.1 Bargaining Power of Suppliers
 - 4.4.2 Bargaining Power of Consumers
 - 4.4.3 Threat of New Entrants
 - 4.4.4 Threat of Substitute Products and Services
 - 4.4.5 Intensity of Competitive Rivalry

5 Market Segmentation

- 5.1 By Device
 - 5.1.1 By Monitoring Devices
 - 5.1.1.1 Self-monitoring Blood Glucose
 - 5.1.1.1.1 Glucometer Devices
 - 5.1.1.1.2 Blood Glucose Test Strips
 - 5.1.1.1.3 Lancets

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.1.1.2 Continuous Glucose Monitoring

5.1.1.2.1 Sensors

5.1.1.2.2 Durables

5.1.2 By Management Devices

5.1.2.1 Insulin Pump

5.1.2.1.1 Insulin Pump Device

5.1.2.1.2 Insulin Pump Reservoir

5.1.2.1.3 Infusion Set

5.1.2.2 Insulin Syringes

5.1.2.3 Cartridges in Reusable pens

5.1.2.4 Insulin Disposable Pens

5.1.2.5 Jet Injectors

5.2 By End User

5.2.1 Hospital/Clinics

5.2.2 Personal/Home

6 MARKET INDICATORS

6.1 Type-1 Diabetes Population

6.2 Type-2 Diabetes Population

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 Abbott Diabetes Care

7.1.2 Roche

7.1.3 LifeScan

7.1.4 Dexcom

7.1.5 Medtronic

7.1.6 ARKRAY Inc.

7.1.7 Ascensia Diabetes Care

7.1.8 AgaMatrix

7.1.9 Bionime Corporation

7.1.10 Novo Nordisk

7.1.11 Eli Lilly

7.1.12 Sanofi

7.1.13 Rossmax International Ltd

7.2 COMPANY SHARE ANALYSIS

7.2.1 Self-monitoring Blood Glucose Devices

7.2.1.1 Abbott Diabetes Care

7.2.1.2 LifeScan

7.2.1.3 Others

7.2.2 Continuous Glucose Monitoring Devices

7.2.2.1 Dexcom Inc.

7.2.2.2 Medtronic PLC

7.2.2.3 Others

7.2.3 Insulin Devices

7.2.3.1 Omnipod

7.2.3.2 Novo Nordisk AS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

7.2.3.3 Others

8 MARKET OPPORTUNITIES AND FUTURE TRENDS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Germany Diabetes Care Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2018 - 2029

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

