

Insulin Glargine - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2018 - 2029

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Report description:

The Insulin Glargine Market size is estimated at USD 1.54 billion in 2024, and is expected to reach USD 2.09 billion by 2029, growing at a CAGR of 6.28% during the forecast period (2024-2029).

The COVID-19 pandemic has resulted in a surge in diabetic complexities, which is driving the insulin demand in the market. Type 1 diabetes can be characterized as insulin-requiring, while Type 2 diabetes can be characterized as insulin-dependent diabetes. People with diabetes have a 300% increased risk of being hospitalized compared to those without diabetes, and, thus, they incur more healthcare expenses than non-diabetic people. Patients with Type 2 diabetes require many corrections throughout the day to maintain nominal blood glucose levels, such as the administration of additional insulin or ingestion of additional carbohydrates. Achieving nominal results can be very difficult without multiple daily injections of insulin or insulin pump therapy. This is driving the demand for insulin on a global scale, which is expected to drive the market studied during the forecast period.

Insulin Glargine Market Trends

Insulin Glargine Market Access has Widened

Sanofi released Toujeo in the European region as the basal insulin for the treatment of type-1 and type-2 diabetes mellitus in adults. According to Sanofi data, Toujeo reported net sales of EUR 933 million globally in 2020, driven primarily by strong performances in European nations. In January 2020, Sanofi announced that the European Commission (EC) had expanded the current indication for Toujeo (insulin glargine 300 units/mL) to include children and adolescents with diabetes. Toujeo is now indicated for the treatment of diabetes mellitus in adults, adolescents, and children under the age of 6 years. This is driving the market in the forecast period, whereas Basaglar was the first biosimilar to Lantus to be launched in some European countries. It

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offers the core protein sequence of Lantus to patients. It is expected to observe an exponential increase in sales volumes during the forecast period, primarily due to its growing adoption and lower cost than its competitors in the European region.

With approximately 56% of the market share, the United States has the biggest global sales of Humalog. The majority of diabetic medicine producers view the nation as a crucial market for boosting overall worldwide sales. For the treatment of diabetes, Humalog is marketed in the US under many brand names, including Humalog Mix 75/25, Humalog U-100, Humalog U-200, and Humalog Mix 50/50. All type-1 diabetics, as well as a tiny proportion of type-2 diabetics, require daily insulin injections as part of their treatment. According to the ADA, government insurance (including Medicare, Medicaid, and the military) pays for 67.3% of the cost of diabetes care in the US. Private insurance (30.7%) and uninsured people (2%), respectively, fund the remaining amount.

North America to Grow with the Highest CAGR over the Forecast Period

Despite advancements in medical technology and health systems, patients in this region are not coping with the challenges of chronic diseases. The incidence of these diseases increased significantly over the past few years. In North America, the market share of traditional human insulin is higher due to its affordability. Novolin holds the highest market share of more than 80%, followed by Humulin and Insuman. However, these traditional brands are facing fierce competition from the local drug market. Among the drugs in the long-acting insulin segment, Lantus holds the highest market share of more than 39.6%, followed by Levemir. New-generation insulin glargine, like Toujeo, Tresiba, and Basaglar, are available in only a few countries. These drugs witnessed good market penetration in the countries they were launched.

Due to the high incidence of diabetes in the region brought on by a sedentary lifestyle, North America, and specifically the United States, now hold a monopoly on the worldwide human insulin market. In the United States, where nearly 50% of the earnings for the makers of insulin come from within the nation, the cost aspect is the main worry. The majority of long-acting insulin, Lantus, sold worldwide is in the United States. The majority of diabetic medicine producers view the nation as a crucial market for boosting overall worldwide sales. Lantus has a disproportionately large market share in the US and is the most often used basal insulin globally. Because it is economically accessible to patients, the conventional North American human insulin pharmaceuticals market is anticipated to expand throughout the projected period. The market share leader is Humulin, followed by Novolin. The conventional North American human insulin medication market in the United States has no generic rivals.

Insulin Glargine Industry Overview

The global insulin glargine market is moderately consolidated, mainly consisting of three major manufacturers (Sanofi, Novo Nordisk, and Eli Lilly) with a global market presence. The remaining manufacturers are confined to the other local or region-specific manufacturers. Mergers and acquisitions that happened between the players in the recent past helped the companies strengthen their market presence. Eli Lilly and Boehringer Ingelheim have an alliance in developing and commercializing Basaglar (insulin glargine), whereas Biocon collaborated with Mylan to develop Semglee (an insulin glargine biosimilar). Prominent players, such as Sanofi, Novo Nordisk, and Lilly, have created a monopoly in the market through their established supply chains and branding, which has resulted in substantial market penetration. These companies work in tandem with several administrative and health agencies to deploy competitive strategies and restrict or eliminate competition from emerging market players.

Additional Benefits:

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

Table of Contents:

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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 Porter's Five Forces Analysis

4.4.1 Bargaining Power of Suppliers

4.4.2 Bargaining Power of Buyers/Consumers

4.4.3 Threat of New Entrants

4.4.4 Threat of Substitute Products

4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

5.1 Insulin Glargine

5.1.1 Lantus

5.1.2 Basaglar

5.1.3 Toujeo

5.1.4 Soliqua/Suliqua

5.1.5 Insulin Glargine Biosimilars

5.2 Geography

5.2.1 North America

5.2.1.1 United States

5.2.1.2 Canada

5.2.1.3 Rest of North America

5.2.2 Europe

5.2.2.1 France

5.2.2.2 Germany

5.2.2.3 Italy

5.2.2.4 Spain

5.2.2.5 United Kingdom

5.2.2.6 Russia

5.2.2.7 Rest of Europe

5.2.3 Latin America

5.2.3.1 Mexico

5.2.3.2 Brazil

5.2.3.3 Rest of Latin America

5.2.4 Asia-Pacific

5.2.4.1 Japan

5.2.4.2 South Korea

5.2.4.3 China

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- 5.2.4.4 India
- 5.2.4.5 Australia
- 5.2.4.6 Vietnam
- 5.2.4.7 Malaysia
- 5.2.4.8 Indonesia
- 5.2.4.9 Philippines
- 5.2.4.10 Thailand
- 5.2.4.11 Rest of Asia-Pacific
- 5.2.5 Middle East and Africa
 - 5.2.5.1 Saudi Arabia
 - 5.2.5.2 Iran
 - 5.2.5.3 Egypt
 - 5.2.5.4 Oman
 - 5.2.5.5 South Africa
 - 5.2.5.6 Rest of Middle East and Africa

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 Novo Nordisk AS
 - 7.1.2 Sanofi Aventis
 - 7.1.3 Eli Lilly and Company
 - 7.1.4 Biocon
 - 7.1.5 Julphar
- 7.2 Company Share Analysis

8 MARKET OPPORTUNITIES AND FUTURE TRENDS

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