

United Kingdom (UK) Diabetes Care Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2018 - 2029

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Report description:

The United Kingdom Diabetes Care Devices Market size is estimated at USD 84.31 million in 2024, and is expected to reach USD 116.32 million by 2029, growing at a CAGR of 6.72% during the forecast period (2024-2029).

The COVID-19 pandemic had a substantial impact on the United Kingdom's diabetes care devices. According to The British Diabetic Association, 'The pandemic has had, and continues to have, a huge impact on our society. However research and data have shown that people with diabetes have been disproportionately affected by COVID-19, particularly in terms of poorer outcomes when contracting the virus. That's why preventing or delaying cases of type 2 diabetes is more important than ever before.'

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. Thus, the COVID-19 outbreak increased the diabetes care device market's growth.

The rate of newly diagnosed cases of Type 1 and Type 2 diabetes is seen to increase, mainly due to obesity, unhealthy diet, and physical inactivity. The rapidly increasing incidence and prevalence of diabetic patients and healthcare expenditure are indications of the increasing usage of diabetic care products. According to The British Diabetic Association, Diabetes prevalence 2021 data shows an increase in the number of people living with a diabetes diagnosis in the UK: an increase of more than 150,000 from 2020. It is estimated that more than 13.6 million people are at increased risk of type 2 diabetes in the UK. At this rate, the number of people with diabetes, including the undiagnosed population, is expected to rise to 5.5 million by 2030.

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Therefore, owing to the aforementioned factors the studied market is anticipated to witness growth over the analysis period.

UK Diabetes Devices Market Trends

Continuous Glucose Monitoring Segment is Expected to Witness a Healthy Growth Rate Over the Forecast Period

The continuous Glucose Monitoring Segment recorded more than USD 1.8 billion in revenue in the current year, which is expected to register further with a CAGR of more than 11.3% during the forecast period.

To use a CGM, a small sensor is inserted into the abdomen or arm with a tiny plastic tube known as a cannula penetrating the top layer of skin. An adhesive patch holds the sensor in place, allowing it to take glucose readings in interstitial fluid throughout the day and night. Generally, the sensors must be replaced every 7 to 14 days. A small, reusable transmitter connected to the sensor allows the system to send real-time readings wirelessly to a monitor device that displays blood glucose data. Some systems contain a dedicated monitor, and some display the information via a smartphone app.

Continuous glucose monitoring sensors use glucose oxidase to detect blood sugar levels. Glucose oxidase converts glucose to hydrogen peroxide, which reacts with the platinum inside the sensor, producing an electrical signal to be communicated to the transmitter. Sensors are the most important part of continuous glucose monitoring devices. Researchers are trying to find and develop alternatives to electrochemical-based glucose sensors and create more affordable, minimally invasive, and user-friendly CGM sensors. Optical measurement is a promising platform for glucose sensing. Some technologies with high potential in continuous glucose sensing are reported, including spectroscopy, fluorescence, holographic technology, etc. Eversense, a CGM sensor based on fluorescence sensing developed by Senseonics Company, presents a much longer lifespan than electrochemical sensors. Technological advancements to improve the accuracy of the sensors are expected to drive segment growth during the forecast period.

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 regularly to monitor their blood glucose levels and adjust the insulin dosing accordingly. 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. Furthermore, the current continuous glucose monitoring devices can either retrospectively display the trends in blood glucose levels by downloading the data or give a real-time picture of glucose levels through receiver displays. 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.

Insulin cartridges in reusable pens occupied the highest share in the management devices segment in the current year

Insulin cartridges in reusable pens occupied the highest market share of about 51% in the management devices segment in the current year.

Insulin cartridges in reusable pens are an upgraded version of insulin vials. Most types of insulins are manufactured in the form of cartridges, making them easily accessible. These devices comprise the functional benefits of reusable pens and are cost-effective, as these cartridges are less expensive compared to disposable insulin pens in the long run. Due to the increasing demand for insulin cartridges, most insulin device manufacturers produce reusable insulin pens compatible with various manufacturers' cartridges.

These insulin cartridges are considered more consumer-friendly, as they are smaller and less noticeable than the classic vial-and-syringe. These devices are also more portable for consumers on the go. Open cartridges do not need to be refrigerated, making storage easy for consumers. Thus, cartridges are the most cost-effective insulin use, as reusable pens are a one-time

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investment, unlike disposable pens.

The National Service Framework (NSF) program is improving services by setting national standards to drive service quality and tackle variations in care. The Association of British HealthTech Industries (ABHI) launched a diabetes section, enabling diabetes technology companies to work together in the first forum of its kind. The ABHI group is for any health technology company interested in diabetes care, from CGM and insulin pumps to apps. Such advantages helped adopt these products in the United Kingdom market.

UK Diabetes Devices Industry Overview

The United Kingdom diabetes care devices market is semi-consolidated, with few significant and generic players. Manufacturers drove constant innovations to compete in the market. The major players, such as Abbott and Medtronic, underwent many mergers, acquisitions, and partnerships to establish market dominance while also adhering to organic growth strategies, which is 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.

Additional Benefits:

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

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