India Blood Glucose Monitoring - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The India Blood Glucose Monitoring Market size is estimated at USD 406.92 million in 2025, and is expected to reach USD 605.41 million by 2030, at a CAGR of 8.27% during the forecast period (2025-2030).

Factors such as the increasing prevalence of diabetes, rising awareness and diagnosis rates, and technological advancements in diabetes management are expected to bolster demand for blood glucose monitoring, thereby driving market growth.

The increasing prevalence of diabetes, combined with rising awareness and higher rates of diagnosis, is significantly boosting the demand for blood glucose monitoring devices. For instance, as per the Indian Council of Medical Research - India Diabetes (ICMR INDIAB) study published in August 2023, the prevalence of diabetes in India was recorded at 10.1 crores, and the number of individuals with diabetes continues to increase in the country. Furthermore, according to the International Diabetes Federation Report published in 2022, the number of people diagnosed with diabetes in India is expected to rise to 92.97 million by 2030 and 124.2 million by 2045. Hence, the rising prevalence of diabetes is expected to increase demand for blood glucose monitoring devices, thus enhancing market growth over the forecast period.

Awareness initiatives for diabetes in India are expected to drive demand for blood glucose monitoring devices. As awareness grows about diabetes and its risks, more individuals are likely to seek diagnosis and management, leading to a higher demand for monitoring tools. For instance, in November 2023, Roche Diabetes Care India (Roche) partnered with public and private entities within India's healthcare system. This move underscored Roche's dedication to enhancing diabetes care access, coinciding with the annual World Diabetes Day. The collaboration focused on boosting diabetes education, raising awareness regarding the health condition, and streamlining early diagnosis and ongoing care initiatives through strategic partnerships.

Additionally, the growing technological advancements in blood glucose monitoring devices, which address the growing need for effective diabetes management in India, are expected to increase their adoption and contribute to the market's growth over the forecast period. According to the article published in Scientific Reports in March 2024, researchers developed IoT-enabled wearable devices that use red and near-infrared spectroscopy for the Indian market. These devices can help measure blood glucose levels non-invasively. These devices, like the iGM system, aim to provide continuous monitoring with improved comfort and reduced risk of infection compared to traditional fingerstick testing. Thus, advancements in non-invasive blood glucose monitoring devices are expected to increase its adoption, thereby boosting market growth.

Moreover, manufacturers are focusing on manufacturing and launching blood glucose monitoring devices in India. For instance, in May 2023, Roche Diabetes Care India (RDC India) revealed that its blood glucose monitoring device, the 'Accu-Chek Active,' was being produced in India. The manufacturing is a collaborative effort with Sanmina-SCI India Pvt. Ltd, while assembly and distribution are handled by Parekh Integrated Services Pvt. Ltd (PISPL). Accu-Chek offers Bluetooth-connected glucometers that allow users to track their blood sugar readings on their smartphones easily. This integration with mobile devices makes it more convenient to monitor and manage diabetes.

Therefore, owing to the factors mentioned above, including the rising prevalence of diabetes, growing awareness and diagnosis rates, technological advancements in diabetes management, and initiatives taken by manufacturers such as developing and launching blood glucose monitoring devices in India, the market is anticipated to witness growth over the forecast period. However, the high cost of advanced blood glucose monitoring may impede the market's growth.

India Blood Glucose Monitoring Market Trends

The Self-monitoring Blood Glucose Devices Segment is Expected to Hold the Prominent Share of the Market

Self-monitoring blood glucose (SMBG) devices are excellent for patients to independently check their blood glucose levels. They are preferred ways to confirm and appropriately treat abnormal sugar conditions. Moreover, these devices offer great flexibility in testing and are used for adequate blood glucose monitoring. In addition, the market participants are undertaking several strategic initiatives to bolster their revenue generation in India. These factors are projected to support segment expansion over the study period.

The high adoption of self-monitoring blood glucose devices among the Indian population, the quick turnaround time from these devices, and the high preference of healthcare professionals are vital factors supporting segment growth in the market studied. For instance, according to an article published in Diabetes Therapy in May 2022, self-monitoring of blood glucose (SMBG) is advised by several guidelines in India, including those from the Indian Council of Medical Research (ICMR). In addition, according to the source mentioned above, the guidelines for managing type 2 diabetes mellitus (T2DM) suggest that SMBG is beneficial for all people with diabetes (PwD) to improve diabetes management, all PwD who are on insulin therapy, patients at risk of ketosis or recurring hypoglycemia, individuals with hypoglycemia unawareness, and in instances requiring tight glycemic control, such as during pregnancy, acute illness, or the presence of complications. Thus, due to the significant guidelines by medical authorities for SMBG, it is projected to support segment expansion over the study period.

Several initiatives, such as manufacturing expansion and agreements undertaken by market players, are further projected to spur segment growth over the study period. For instance, in May 2023, Roche Diabetes Care India (Roche) started manufacturing a self-blood glucose monitoring device, 'Accu-Chek Active,' in India. This initiative aligns with the company's strategy to enhance access to diabetes care and address the increasing demands of the Indian market.

Thus, the high demand for SMBG devices, several advantages associated with them, and several strategic initiatives undertaken by market players are projected to spur segment expansion over the study period.

The Hospital/Clinical Usage Segment is Expected to Witness the Highest Growth Rate Over the Forecast Period

Hospitals are among the most common places where blood glucose monitoring devices are employed to monitor glucose levels for different types of patients, including critically ill patients. In developing countries like India, hospitals and clinics provide affordable care to diabetic patients, which leads to the increased adoption of blood glucose monitoring devices in healthcare facilities. The clinics and hospitals segment in the blood glucose monitoring market is also experiencing notable growth owing to specialized trained staff and government initiatives to support diabetes care in healthcare facilities.

The high adoption of blood glucose monitoring devices with advanced technology, such as artificial intelligence (AI), in hospitals, is supporting the segment's growth. For instance, according to an article published in the World Journal of Diabetes1 in May 2023, a study conducted by the Max Super Specialty Hospital, New Delhi, India, mentioned that AI-powered applications and devices are utilized in clinical settings for managing non-critically ill diabetic patients.

In addition, according to the source mentioned above, continuous blood glucose monitoring (CGM) devices like the Dexcom G6 feature automated insulin suspension through AI algorithms. Basal-IQ technology can predict when blood glucose levels will drop below set thresholds and enable insulin infusion adjustment as needed. Systems that regulate insulin infusion with CGM technology have demonstrated a significant reduction in hypoglycemic episodes in critically ill patients admitted to hospitals. Thus, the considerable usage of glucose monitoring devices for managing glucose levels in critically ill patients is projected to support segment growth.

Furthermore, various market player initiatives are expected to spur segment growth over the study period. For instance, in May 2022, MFine, India's digital health platform, unveiled a groundbreaking innovation that directly enables blood pressure and glucose monitoring through a smartphone. The vitals measurement feature of MFine was developed for two years, involving extensive AI research in collaboration with prominent hospitals and successful trials carried out with over 3,000 patients.

Thus, the significant usage of blood glucose monitoring devices in hospitals for critically ill patients and several strategic initiatives undertaken by market players, such as partnerships with hospitals for conducting clinical trials, are projected to spur segment expansion over the study period.

India Blood Glucose Monitoring Industry Overview

The Indian blood glucose monitoring market is moderately fragmented, with few significant and generic players. The major players in the blood glucose monitoring market are actively developing new products and engaging in partnerships to expand their market presence. Some of the major market players are Abbott, F. Hoffmann-La Roche Ltd, Medtronic PLC, Ascensia Diabetes Care Holdings AG, and Arkray Inc.

Additional Benefits:

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