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Blood Glucose Monitoring (BGM) Devices - A Global Market Overview

Market Report | 2025-05-14 | 246 pages | Industry Experts

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Report description:

Blood Glucose Monitoring (BGM) Devices Market Trends and Outlook

Blood glucose monitoring devices are used to manage diabetes and monitor blood glucose levels in diabetic patients. These devices enable patients to conveniently and with minimal invasiveness check their blood glucose levels, conduct quantitative tests, and provide information on blood glucose concentrations. Blood glucose monitoring devices are primarily two types: Self-Monitoring Blood Glucose (SMBG) Devices and Continuous Blood Glucose Monitoring (CBGM) Devices. SMBG relies on glucometers, test strips, and lancets to assess blood glucose levels through finger-prick samples, facilitating real-time monitoring at home. Test strips are enzyme-coated disposable elements crucial for accurate measurements, while lancets are used to collect blood samples. CBGM devices, on the other hand, continuously assess glucose levels in interstitial fluid through subcutaneous sensors, which send data wirelessly to receivers that display real-time trends and alerts. These systems lessen the necessity for frequent manual testing and provide a clearer understanding of glucose variations. Insulin pumps, frequently used alongside CBGMs, deliver insulin in regulated doses, offering a more adaptable and responsive approach to diabetes management. Collectively, these devices improve patient outcomes by enhancing accuracy, convenience, and the ability to make real-time decisions.

The global Blood Glucose Monitoring (BGM) Devices market size is valued at US$16 billion in 2024 and is projected to reach US$25.3 billion by 2030, growing at a CAGR of 8.1%. Growth is driven by rising diabetes prevalence, aging populations, and the shift toward preventive and home-based healthcare. Demand is increasing for self-monitoring (SMBG) and continuous monitoring (CBGM) systems that offer real-time, personalized data. Technological advancements, such as smartphone integration, cloud sharing, and AI analytics, are enhancing user experience and glycemic control. Government and industry investments in education, R&D, and affordability are expanding access, especially in emerging markets. As diabetes cases rise globally, the BGM devices market is set for sustained growth and innovation.

Blood Glucose Monitoring (BGM) Devices Regional Market Analysis

North America dominates the global blood glucose monitoring (BGM) devices market, accounting for 38.6% of the market share in 2024, due to the high prevalence of diabetes, advanced healthcare infrastructure, and strong awareness of diabetes management. Favorable reimbursement policies, the widespread adoption of self-monitoring and continuous glucose monitoring systems, and robust government support further boost demand. The United States, in particular, shows strong dominance due to its early adoption of advanced technologies and proactive healthcare policies. Conversely, the Asia-Pacific region is the fastest-growing market, with a projected CAGR of 10.2% during 2024-2030, fueled by the increasing diabetes prevalence in countries like China and India. Factors such as rising healthcare expenditure, improving infrastructure, growing health awareness, and expanding access to affordable monitoring solutions are accelerating growth. Additionally, government initiatives, urbanization, and the expanding middle class are driving significant demand for home-based and continuous glucose monitoring systems across the region.

Blood Glucose Monitoring (BGM) Devices Market Analysis by Product

The self-monitoring blood glucose (SMBG) devices segment is the largest in the BGM market with an estimated share of 65.2% in 2024, owing to its affordability, user-friendliness, and wide adoption among type 2 diabetes patients. These devices, including glucose meters, test strips, and lancets, enable convenient at-home testing, allowing users to manage their diabetes effectively. A high prevalence of diabetes, increasing awareness of self-care, and ongoing demand for consumables like test strips contribute to ongoing growth. This segment also benefits from technological advancements and a growing emphasis on preventive healthcare and personalized treatment. On the other hand, continuous blood glucose monitoring (CBGM) devices represent the fastest-growing segment, anticipated to record the CAGR of 11.7% from 2024 to 2030. CBGM systems offer real-time glucose monitoring using subcutaneous sensors and wireless transmitters, helping to prevent severe hypoglycemia and reduce the need for frequent finger pricks. Their precision, convenience, and increasing adoption for managing type 1 diabetes are driving this segment's market growth, supported by rising awareness and innovation in wearable health technology.

Self-Monitoring Blood Glucose (SMBG) Devices Market Analysis by Product sub-type

Test strips lead the self-monitoring blood glucose (SMBG) devices market with a 58.7% share in 2024, driven by their affordability, portability, and user-friendliness. Their widespread use is bolstered by the increasing diabetes prevalence, particularly in developing regions looking for cost-effective options. Technological advancements have improved accuracy and reduced the need for blood samples, while digital platform integration has enhanced their overall usability. Ongoing reimbursement and healthcare support further reinforce their leading position in the market. In contrast, glucometer devices are projected to register the fastest growth rate at a CAGR of 6.6% during the 2024-2030 analysis period. This growth is fueled by innovations such as smart connectivity, quicker results, and user-friendly designs, making them more appealing to technology-oriented users and older adults. The surge in home healthcare and heightened awareness of diabetes management are also contributing to the increased adoption of glucometers in developing markets.

Continuous Blood Glucose Monitoring (CBGM) Devices Market Analysis by Product sub-type

The sensors segment dominates the continuous glucose monitoring (CGM) devices market, capturing around 45% share in 2024, primarily due to the recurring need for sensor replacements every 7 to 14 days. This segment benefits from increasing CGM adoption among Type 1 and Type 2 diabetes patients, especially in developed regions. Technological advancements have improved sensor accuracy, extended wear time, and enhanced smartphone connectivity, boosting user preference. Favorable reimbursement policies and rising awareness of CGM benefits over traditional methods drive demand. Additionally, more affordable sensors are broadening market access in emerging economies. Meanwhile, the insulin pumps segment is expected to experience the fastest CAGR of 12.5% from 2024 to 2030. This growth is fueled by increased efforts to reduce hypoglycemia risks and reduce mortality rates. Frequently integrated with CGM systems and backed by personal data management software, insulin pumps provide accurate, automated insulin delivery, making them more popular in advanced diabetes management.

Blood Glucose Monitoring (BGM) Devices Market Analysis by End-User

The hospital end-user segment holds the largest share of the blood glucose monitoring devices market in 2024, accounting for 44%. This dominance is driven by the rising number of hospital admissions for diabetic patients and the need for real-time, accurate glucose data to guide treatment planning. Inpatient and outpatient settings in the hospitals utilize both self-monitoring and CGM devices, benefiting from systems that efficiently store and transfer patient data. Serving as primary centers for advanced diabetes care and patient education, hospitals play a significant role in the adoption of these devices. Conversely, the home care settings segment is expected to witness the fastest growth rate at a CAGR of 8.9% from 2024 to 2030. This growth is driven by a growing preference among patients for managing diabetes at home, aided by advancements in user-friendly technologies like CGMs and SMBG tools. Home monitoring provides convenience and increased control, enabling individuals to evaluate how their diet, exercise, insulin, and stress impact their glucose levels. The growing trend towards self-care and preventive health further boosts the demand for home care devices.

Blood Glucose Monitoring (BGM) Devices Market Report Scope
This global report on Blood Glucose Monitoring (BGM) Devices analyzes the market based on product type and sub-types, and end-user for the period 2021-2030 with forecasts from 2024 to 2030 in terms of value in US$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics
Historical Period: 2021-2023
Base Year: 2024
Forecast Period: 2024-2030
Units: Value market in US$
Companies Mentioned: 32

Blood Glucose Monitoring (BGM) Devices Market by Geographic Region
- North America (The United States, Canada and Mexico)
- Europe (Germany, France, the United Kingdom, Italy, Spain and Rest of Europe)
- Asia-Pacific (Japan, China, India, South Korea and Rest of Asia-Pacific)
- South America (Brazil, Argentina and Rest of South America)
- Rest of World

Blood Glucose Monitoring (BGM) Devices Market by Product
- Self-Monitoring Blood Glucose (SMBG) Devices
  - Test Strips
  - Glucometer Devices
  - Lancets
- Continuous Blood Glucose Monitoring (CBGM) Devices
  - Sensors
  - Transmitters & Receivers
  - Insulin Pumps

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- Beurer GmbH
- Bionime Corporation
- Cequr
- Cnoga Medical Ltd.
- Dariohealth Corp.
- DexCom, Inc.
- Embecta Corp.
- Entra Health Systems LLC
- F. Hoffmann-La Roche AG
- Glysens Incorporated
- Insulet Corporation
- LifeScan Inc.
- Medtronic PLC
- Nipro Corporation
- Nova Biomedical Corporation
- Novo Nordisk A/S
- Omron Healthcare Co., Ltd.
- Rossmax International Ltd
- Sanofi SA
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