

Global Insulin Pumps Market - Focused Insights 2021-2030

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Report description:

The global insulin pump market is expected to grow at a CAGR of 9.10% during the forecast period.

KEY TAKEAWAYS

- By Product Type: In 2024, the insulin pump segment accounted for over 65% of the global market share, making it the largest category within the global insulin pump market.
- By Indication Type: The type 1 segment is expected to grow at the fastest CAGR of 9.31%, contributing significantly to the overall expansion of the market.
- By End-User: The hospital segment accounted for the largest market share.
- By Geography: North America holds the largest market share of over 38%, and APAC shows the highest growth during the forecast period.
- Growth Factor: The global insulin pump market is set to grow due to the growing prevalence of diabetes and technological advancements in insulin pump design.

INSULIN PUMP MARKET TRENDS & DRIVERS

Increase in Number of Product Approvals

The insulin pump industry is witnessing a surge in product approvals, reflecting intensified research and development efforts aimed at enhancing diabetes management. Notable recent approvals include:

- Medtronic MiniMed 780G: Approved in 2023, this advanced automated insulin delivery system features 'Meal Detection Technology' and integrates with continuous glucose monitoring (CGM) to automatically adjust insulin delivery, improving glycemic control for users aged 7 and older with type 1 diabetes.
- Tandem Mobi: Launched in 2024, Tandem Diabetes Care introduced this compact automated insulin delivery system in the US,

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offering users more choices and innovative options for wearability.

These approvals signify a commitment to expanding treatment options and improving the quality of life for individuals managing diabetes.

Rising Adoption of Automated Insulin Delivery (AID) Systems

Automated Insulin Delivery systems, also known as artificial pancreas systems, are gaining traction due to their ability to automate insulin dosing based on real-time glucose readings. Omnipod 5 system integrates with leading CGM sensors, providing automated insulin delivery without the need for manual adjustments, enhancing glycemic control and reducing the burden of diabetes management. The adoption of AID systems is transforming diabetes care by offering more precise and user-friendly insulin delivery methods.

Growing Prevalence of Diabetes

The rising global incidence of diabetes, especially Type 1 diabetes, is one of the most significant factors driving the insulin pump market. According to the International Diabetes Federation (IDF), over 589 million adults worldwide were living with diabetes in 2024, a number projected to reach 853 million by 2050. As diabetes becomes more widespread across age groups and regions, there is a growing demand for effective and manageable insulin delivery methods. Insulin pumps provide more precise glucose control than traditional methods, making them increasingly attractive to healthcare providers and patients alike.

Technological Advancements

Advances in diabetes technology have significantly enhanced the capabilities and appeal of insulin pumps. Innovations include:

- Integration with Continuous Glucose Monitoring (CGM) systems
- Automated insulin delivery (closed-loop or artificial pancreas systems)
- Bluetooth-enabled smart pumps with mobile app connectivity
- Use of AI and machine learning for predictive insulin dosing

These advancements have improved patient outcomes, reduced management burdens, and increased trust in pump technology. Moreover, user-friendly interfaces, discreet designs, and better battery life contribute to higher adoption rates.

INSULIN PUMPS MARKET SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT TYPE

The global insulin pump market by product type is segmented into insulin pumps and consumables. In 2024, the insulin pump segment accounted for over 65% of the market share. The insulin pump is a portable medical device that is attached to the body and continuously delivers the amount of rapid or short-acting insulin through a catheter that is placed under the skin. Insulin pumps are available in two forms such as tethered and patch pumps. With the increasing diabetes prevalence posing a significant burden on health systems, a demand for new technologies in diabetes care delivery. The advancement in insulin pumps stands as a golden opportunity for diabetes patients as well as healthcare professionals.

The tethered pumps maintain a large user base due to their precision and customizability. Tethered pumps serve key advantages like high customization, precision in dosing, integration with CGMs, and proven reliability. While patch pumps are rapidly growing with their user-friendly design. The future of patch insulin pumps looks favorable, driven by advancements in wearable technology, AI integration, and growing consumer demand for convenience.

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INSIGHTS BY INDICATION TYPE

The global insulin pump market by indication type is categorized into type 1 diabetes and type 2 diabetes. Type 1 diabetes shows significant growth, with the fastest-growing CAGR of 9.31% during the forecast period. It is one of the leading chronic conditions that severely impacts all demographics. Insulin pumps offer an advanced alternative by delivering continuous subcutaneous insulin infusion (CSII), mimicking the body's natural insulin patterns. This is particularly beneficial for T1D patients who need both basal (background) and bolus (mealtime) insulin throughout the day.

The combination of insulin pumps with continuous glucose monitors (CGMs) and advanced algorithms has led to automated insulin delivery systems (also known as hybrid closed-loop or artificial pancreas systems), which are especially beneficial for Type 1 diabetes patients. Insulin pumps are widely recommended for children and adolescents with Type 1 diabetes, as they offer better control with less discomfort than multiple daily injections.

INSIGHTS BY END-USER

Based on the end-user, the hospital segment accounted for the largest global insulin pump market share. Hospitals are the primary care settings that are operating the major diabetes burden every day. The significant patient population is dependent on the hospital setting to manage their diabetes. As the prevalence of diabetes increases every day, the demand and popularity of diabetes management devices are increasing, with insulin pumps becoming a top priority for medical professionals.

Hospitals often serve as the starting point for new insulin pump users, providing the necessary medical evaluation, device setup, and training by endocrinologists and diabetes educators. Hospitals are a key institutional customer segment for insulin pump manufacturers. Hospitals often purchase pumps for use in diabetes education clinics and training sessions. Many hospitals conduct research involving insulin pumps to evaluate new technologies and treatment protocols, helping to expand the evidence base.

GEOGRAPHICAL ANALYSIS

North America dominates and holds the largest global insulin pump market share of over 38%. North America stands as the dominant region in the global insulin pump market, driven by advanced healthcare infrastructure, high diabetes prevalence, and widespread adoption of medical technologies. The US and Canada have been at the forefront of insulin pump innovation, usage, and regulatory advancements. North America, particularly the US, stands as the most mature market for insulin pumps. The region benefits from a well-established healthcare system, high diabetes prevalence, robust insurance coverage, and the presence of leading insulin pump manufacturers such as Medtronic and Tandem Diabetes Care. In addition, the presence of market players and greater access to the insulin pump solution with higher economic stability give a boost to the market growth. Medtronic, Insulet, and Tandem Diabetes Care are the three major companies which has significant market penetration in the region.

The APAC region is expected to grow at the fastest CAGR of 10.84% during the forecast period. The APAC region presents a significant burden of diabetes. According to the IDF, countries like China and India have some of the highest numbers of people living with diabetes globally. Rising urbanization, sedentary lifestyles, and dietary changes have contributed to a surge in both Type 1 and Type 2 diabetes, particularly in urban and middle-income populations. The regulatory landscape in APAC is evolving, with a growing emphasis on patient safety and medical device efficacy. Countries such as Japan, South Korea, and Australia have well-established regulatory bodies that closely evaluate insulin pump products before approval.

INSULIN PUMP MARKET VENDOR LANDSCAPE

The global insulin pump market report contains exclusive data on 23 vendors. The market is a dynamic and competitive space driven by rapid technological advancements, increasing diabetes prevalence, and a growing shift toward patient-centric care. The

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market is characterized by a mix of established industry leaders, innovative startups, and strategic collaborations aiming to offer smarter, safer, and more efficient insulin delivery solutions. The insulin pump landscape is primarily dominated by a few major players with global reach, including Medtronic, Insulet, and Tandem Diabetes Care. Other notable players include Roche, Ypsomed, SOOIL Development, Debiotech, and emerging firms such as Beta Bionics and Modular Medical, which are introducing next-gen technologies. Companies are investing heavily in R&D to develop smaller, smarter, and interoperable pumps with features like touchscreen displays, Bluetooth connectivity, and closed-loop automation.

RECENT VENDORS ACTIVITIES

Vendors are heavily investing in R&D to develop next-generation insulin pumps that offer better control, ease of use, and integration with other diabetes management technologies.

- Medtronic: Medtronic continues to enhance its MiniMed series, including the 780G system, a hybrid closed-loop pump that automatically adjusts insulin delivery based on CGM (Continuous Glucose Monitoring) readings.
- Insulet Corporation: Known for its Omnipod tubeless, patch-style pump, Insulet focuses on discreet, wearable insulin delivery. Its newer models, like the Omnipod 5, feature automated insulin dosing with real-time glucose data.
- Tandem Diabetes Care: Offers t:slim X2 insulin pump with Control-IQ technology, integrating CGM and automated insulin delivery. The company is known for its user-friendly touchscreen interface and software update capability.
- Many vendors are focusing on building ecosystems that combine insulin pumps with mobile apps, AI algorithms, and CGM devices to create a seamless user experience.
- Partnerships with CGM companies like Dexcom and Abbott have become standard, allowing pumps to make real-time insulin adjustments based on glucose levels.
- Vendors are also exploring cloud-based platforms for remote monitoring and telehealth compatibility, allowing healthcare providers to track patient data more efficiently.

Key Vendors

- Insulet
- Medtronic
- Tandem Diabetes Care

Other Prominent Vendors

- CeQur Simplicity
- Debiotech SA
- EOFLOW
- F. Hoffmann-La Roche
- IA Collaborative Holdings
- Jiangsu Delfu medical device
- LenoMed Medical
- MannKind
- Medtrum Technologies
- Medzer
- MicroPort Scientific
- MicroTech Medical
- Novo Nordisk
- Shanghai Umitai Medical Technology

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- Modular Medical
- Beta Bionics

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 - o□Brazil
 - o□Mexico
 - o□Argentina
 - o□Columbia
 - Middle East & Africa
 - o□Turkey

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KEY QUESTIONS ANSWERED:

1. How big is the global insulin pump market?
2. How are technological advancements impacting the market?
3. What is the growth rate of the global insulin pump market?
4. What is driving the growth of the global insulin pump market?
5. Are insulin pumps used for both Type 1 and Type 2 diabetes?
6. Who are the key players in the global insulin pump market?

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