

United States Insulin Market Assessment, By Product [Rapid-Acting Insulin, Long-Acting Insulin, Combination Insulin, Biosimilar, Others], By Type [Human Insulin, Insulin Analog], By Application [Type 1 Diabetes Mellitus, Type 2 Diabetes Mellitus], By Distribution Channel [Hospital Pharmacies, Retail Pharmacies, Online Pharmacies], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

United States insulin market is projected to witness a CAGR of 2.89% during the forecast period 2025-2032, growing from USD 8.10 billion in 2024 to USD 10.17 billion in 2032. The market's growth and expansion are supported by the rising cases of diabetes, increasing investments in research and development activities, and the strong presence of leading pharmaceutical companies in the country. As per the estimates of the Centers for Disease Control and Prevention, approximately 38 million people in the United States have diabetes. The rapid expansion of the geriatric population, increasing awareness about diabetes, and growing incidences of obesity are further augmenting the market's demand.

Obesity increases the risk of developing type 2 diabetes as excessive body weight adds to insulin resistance, making it difficult to regulate blood glucose levels. The Centers for Disease Control and Prevention estimates that more than 2 in 5 adults in the United States have obesity. As obesity rates continue to increase, the requirement for effective diabetes management solutions is expected to rise in the United States, providing lucrative growth opportunities for the market.

Rising Collaborations Support Market Expansion

Strategic partnerships between pharmaceutical and biotechnology companies and healthcare organizations are allowing the pooling of resources, expertise, and manufacturing capabilities, which in turn are accelerating the development and distribution of insulin therapies across the country. Furthermore, collaborations also support the introduction of innovative insulin formulations and delivery systems, allowing pharmaceutical companies to meet the diverse requirements of the patient population and expand their presence in the industry. For instance, in February 2025, Oramed Pharmaceuticals Inc. announced a joint venture with Hefei

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Tianhui Biotech Co., Ltd. to form OraTech Pharmaceuticals Inc. to accelerate the development and delivery of Oramed's oral insulin (ORMD-0801) and other Protein Oral Delivery (POD) technologies. With an emphasis on commercialization and development, a pipeline poised for clinical advancements, and a strong financial foothold, OraTech is expected to transform oral biologics and redefine diabetes care.

Supportive Government Policies Boost Market Growth

The introduction of supportive government policies is playing a crucial role in shaping the trajectory of the market in the United States. In response to public pressure and advocacy, several state governments and federal programs have introduced price caps on insulin. The Inflation Reduction Act of 2022, for instance, implemented a USD 35 monthly cap on insulin for Medicare beneficiaries. This has positively impacted prescription adherence and reduced emergency hospital visits due to unmanaged diabetes. For instance, in March 2023, Eli Lilly announced a 70% reduction in the list prices of its most commonly prescribed insulins and expanded its Insulin Value Program, capping out-of-pocket costs at USD 35 or less per month. Furthermore, legislative support is also bolstering investments in domestic insulin production, including initiatives to support nonprofit insulin manufacturers.

Technological Advancements Drive Market Demand

The integration of digital tools with insulin therapy is transforming diabetes management and allowing the patient population to live a normal life. Smart insulin pens, continuous glucose monitors, and insulin pumps are enabling patients to better monitor and control their blood sugar levels. These advanced devices are connected to smartphone apps, offering real-time data sharing and decision support systems that enhance adherence and patient outcomes. Leading medical device providers are also working on launching new technologies and products to ensure patient compliance by enhancing their comfort. For instance, in April 2023, Medtronic plc received approval from the US Food and Drug Administration (FDA) for its MiniMed 780G system with the Guardian 4 sensor, marking the approval of the first system to provide meal detection technology. Such launches are allowing patients to monitor their blood glucose levels with ease and improving patient outcomes.

Online Pharmacies Expected to Witness Significant Growth

The segment's growth is supported by the evolving consumer preferences and competitive pricing and convenience offered by online pharmacies. The rising availability of telehealth services across the United States, coupled with the expansion of e-commerce platforms, further supports online pharmacies' growth. These platforms often provide lucrative discounts, home delivery, and automated prescription refills, allowing patients to manage chronic conditions such as diabetes with ease. Additionally, leading online pharmacies are focusing on enhancing the quality of the services that they provide, allowing them to hold a major share of the market. For instance, in October 2024, Amazon.com, Inc. announced plans to expand their same-day prescription delivery services to twenty more cities in the United States by the end of 2025.

Impact of the U.S. Tariffs on the United States Insulin Market

- Insulin prices in the United States are expected to increase significantly following the introduction of tariffs as the manufacturers might pass the additional expenses onto the consumers, posing significant challenges for underinsured or uninsured consumers who already face high out-of-pocket costs for insulin.
- The tariffs are also expected to disrupt supply chains, resulting in potential insulin availability delays, forcing manufacturers to restore their production and seek alternative sources for active pharmaceutical ingredients.
- The estimated escalation in costs could potentially strain insurance and healthcare providers, resulting in reduced coverage and higher premiums for the patient population.

Key Players Landscape and Outlook

The key players in the market are focusing on partnerships and collaborations to bolster the accessibility of insulin across the United States. For instance, in March 2025, Biocon Biologics Limited, a subsidiary of Biocon Limited, partnered with Civica, Inc. to increase the affordability and accessibility of Insulin Aspart in the country. Under the agreement terms, Biocon Biologics will provide Insulin Aspart substance to Civica, which will manufacture the rapid-acting insulin analog in Virginia, United States. The latter will also commercialize the medicine in the country. Such partnerships showcase the commitment of the leading market players in ensuring the supply of life-saving medications and are expected to provide lucrative growth opportunities for the market.

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