Australia Diabetes Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 75 pages | Mordor Intelligence

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Report description:

Australia Diabetes Devices Market Analysis

The Australia diabetes devices market is valued at USD 721.44 million in 2025 and is forecast to reach USD 814.65 million by 2030, expanding at a 2.46% CAGR. The Australia diabetes devices market size reflects a mature reimbursement environment, strong clinician acceptance of real-time glucose data, and steady technological upgrades that keep replacement cycles active. Wider National Diabetes Services Scheme (NDSS) subsidies for continuous glucose monitoring (CGM), the shift toward automated insulin delivery, and rising type 2 diabetes prevalence are underpinning demand. Integrated digital health infrastructure-especially universal electronic health records-reduces onboarding barriers for new devices and promotes data-driven care pathways. Global manufacturers are intensifying local partnerships to marry device ecosystems with the My Health Record platform, while start-ups concentrate on pain-free diagnostics aimed at underserved groups. Competitive momentum now centers on linking glucose data to broader cardiometabolic platforms, a move likely to reshape procurement criteria over the next five years.

Australia Diabetes Devices Market Trends and Insights

Expansion of CGM reimbursement via NDSS & private health funds

National reimbursement initiatives have transformed the Australia diabetes devices market by removing upfront cost barriers for real-time CGM. The NDSS CGM Initiative, which subsidises CGM for every person with type 1 diabetes, lifted utilisation from 5% to

as high as 79% among eligible users . Insurers have complemented this policy, funding sensors for high-risk pregnancies and paediatric cohorts. Evidence from cost-utility studies shows an incremental cost-effectiveness ratio of AUD 39,518 per quality-adjusted life-year versus self-funded use . Heightened public coverage has also stimulated manufacturer competition, prompting quicker rollouts of next-generation sensors with longer wear time and factory calibration.

Escalating diabetes prevalence driving device demand

Diagnosed diabetes cases reached 1.3 million in 2025, with an additional 500,000 people undiagnosed, underscoring unmet monitoring needs. Type 2 diabetes accounts for seven in ten cases and is rising fastest in lower-income and Indigenous populations. The Australia diabetes devices market benefits directly, as primary-care guidelines encourage earlier CGM initiation for complex type 2 profiles. Advocacy groups are lobbying to extend NDSS subsidies from type 1 to insulin-requiring type 2 cohorts, a policy change that could lift sensor volumes by a further 20%.

High out-of-pocket cost of pump consumables outside insurance cover

While public and private schemes offset sensor costs, many Australians still pay USD 4,600-USD 6,600 equivalent for pump consumables across a four-year warranty cycle. Parliamentary modelling shows universal pump subsidies would require up to AUD 749 million over forward estimates. Price pressures deter uptake among low-income adults, contributing to slower penetration of automated insulin delivery systems beyond paediatric segments. The Australia diabetes devices market therefore faces a ceiling effect until funding parity with CGM is achieved.

Other drivers and restraints analyzed in the detailed report include:

Rapid uptake of digital health and telehealth services / Local R&D for non-invasive CGM / Limited interoperability between imported pumps & local apps /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Monitoring devices generated 57.13% of Australia diabetes devices market revenue in 2025 and represent the anchor segment. Strong NDSS backing vaulted CGM penetration, making sensors routine even in primary care. At USD 410 million, the monitoring slice of the Australia diabetes devices market size benefits from frequent sensor replacement that ensures recurring revenue. The early-2025 addition of Dexcom G7 and FreeStyle Libre 2 Plus reinforced competitive intensity, with both brands offering twelve-hour warm-up times and predictive alert algorithms that satisfy national clinical guidelines.

Management devices earned the remaining share but are expanding at a 3.10% CAGR, the fastest within the portfolio. Evidence from multi-centre Queensland trials indicates that automated insulin delivery improves time-in-range by 15 percentage points, translating to lower complication risk and stronger payer support. If the proposed universal pump subsidy passes Parliament by 2026, uptake could propel the therapy segment to USD 380 million by 2030, thereby shrinking the gap between monitoring and management categories within the Australia diabetes devices market.

Hospital systems contributed 48.31% of Australia diabetes devices market share in 2025 because they are the primary enrolment point for pump initiation, sensor training, and acute complication management. Large metropolitan teaching hospitals run specialised diabetes technology clinics that standardise device selection protocols. In rural regions, district hospitals rely on visiting nurse educators, yet still dominate procurement budgets, reinforcing hospital grip on the supply chain of the Australia diabetes devices market.

Home-care settings are climbing at a 3.00% CAGR as telehealth compresses geographic constraints. A national survey showed 64% of sensor users now transmit real-time glucose data to clinicians from home, reducing routine clinic visits. Private insurers are piloting bundled payment models that provide sensors, smart pens, and virtual coaching under a single premium. This shift encourages longer-term adherence, suggesting home-care could surpass 35% revenue share of the Australia diabetes devices market by 2030.

The Australia Diabetes Devices Market Report Segments the Industry Into Device Type (Management Devices and Monitoring Devices), by End User (Home-Care Settings, Hospitals, and More), by Diabetes Type (Type 1 Diabetes, Type 2 Diabetes and Gestational Diabetes), by Technology (Invasive Systems, Minimally Invasive Systems, and Non-Invasive Systems). The Market Sizes and Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Abbott Laboratories / Medtronic / Dexcom / Roche / Novo Nordisk / Sanofi / Eli Lilly and Company / Lifescan / Ascensia / Insulet / Ypsomed / Tandem Diabetes Care / Senseonics / B. Braun / Arkray / AgaMatrix / Terumo /

Additional Benefits:

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

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