

## **North America Diabetes Drugs - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-06-01 | 150 pages | Mordor Intelligence

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### **Report description:**

North America Diabetes Drugs Market Analysis

The North America diabetes drugs market stood at USD 42.08 billion in 2025 and is forecast to reach USD 54.94 billion by 2030, translating to a 5.48% CAGR during the period. A growing convergence of diabetes and obesity treatment, coupled with rapid uptake of next-generation GLP-1 receptor agonists, is providing much of the forward momentum. U.S. prescription drug spending climbed 10.2% in 2024, and GLP-1s already rank as the largest and fastest-growing therapeutic spend category. Oral anti-diabetics continue to control the majority of therapy volumes even as injectable innovation accelerates, and biosimilar insulin introductions are compressing prices in key segments. Tight Medicare negotiations, state price-cap statutes, and payer prior-authorization rules are reshaping formulary choices, yet therapeutic innovations keep total spending on an upward trajectory. Mexico's emergence as a manufacturing hub and the expansion of online pharmacies are also altering competitive economics and patient access across the region.

North America Diabetes Drugs Market Trends and Insights

Increasing adoption of GLP-1 agonists in obese T2DM

GLP-1 receptor agonists unify obesity and diabetes management, a nexus relevant to more than 88% of people with Type 2 diabetes. Tirzepatide reached roughly 12% prescription share of glucose-lowering drugs by end-2023, and its popularity among non-diabetic weight-management users underscores the therapeutic blur between metabolic indications. Dual GLP-1/GIP activity

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delivers greater body-weight and HbA1c reductions than single-target drugs, while emerging triple-agonists such as retatrutide have posted 24% weight loss at 48 weeks, setting new clinical benchmarks. Fast-tracked FDA approvals for wider cardiometabolic indications are expanding reimbursement horizons and encouraging prescribers to adopt these therapies earlier in care pathways.

#### Reimbursement expansion for dual & triple incretins

Payers are recalibrating formularies to recognize the cardiovascular and renal benefits of dual and triple incretins. Medicare's price negotiations apply greater pressure on legacy oral agents, while newer GLP-1s gain Tier-preferred coverage, thus lowering out-of-pocket costs for seniors. Commercial insurers now classify obesity as a medical condition, unlocking pharmacotherapy budgets previously reserved for diabetes. Employer health plans are bundling obesity and diabetes care contracts tied to outcome metrics, reinforcing utilization growth.

#### Payer prior-authorization throttles GLP-1 volumes

US payers continue to impose multi-step therapy rules that delay or deny GLP-1 initiation despite favorable clinical profiles, leading to patient drop-out and slower overall market penetration. Medicare Advantage plans remain especially cautious in approving weight-management uses, preserving utilization caps that curb early growth.

Other drivers and restraints analyzed in the detailed report include:

Biosimilar insulin price wars accelerate uptake / CGM-linked dosing algorithms spur drug adherence / API tariff risk from China supply concentration /

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

#### Segment Analysis

Oral agents secured 68.23% of the North America diabetes drugs market in 2024 and are projected to expand at 7.52% CAGR through 2030, sustaining leadership despite injectable breakthroughs. SGLT-2 inhibitors such as canagliflozin continue to gain based on cardio-renal outcome data and Health Canada labeling updates.

Non-insulin injectables are climbing rapidly on the back of GLP-1, dual GIP/GLP-1, and emerging triple-agonist classes. Triple-mechanism drugs are positioned as premium therapies offering weight, cardiovascular, and renal benefits, thereby lifting value per prescription within the North America diabetes drugs market. Alpha-glucosidase inhibitors retain a niche among geriatric cohorts, and combination pills that merge multiple mechanisms aim to simplify dosing and boost adherence.

Therapies for Type 2 diabetes continue to dominate revenue, yet Type 1 options are showing the strongest incremental gains. Integration of weekly semaglutide with automated insulin delivery lifted time-in-range metrics from 69.4% to 74.2%, a meaningful clinical advance. The resulting enthusiasm is expanding the North America diabetes drugs market size for Type 1 adjuncts. Gene-therapy programs aimed at beta-cell regeneration are still pre-commercial but underscore the pipeline depth.

The North America Diabetes Drugs Market Report is Segmented by Drug Class (Insulins [Biosimilar Insulin and More], Non-Insulin Injectable, Oral Anti-Diabetic and Combination Drugs), Diabetes Type (Type 1 Diabetes and Type 2 Diabetes), Drug Origin (Branded and Generic/Biosimilar), Distribution Channel (Hospital Pharmacies, Retail Pharmacies and More) and Geography. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

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Additional Benefits:

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

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