South Korea Diabetes Devices - 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:

South Korea Diabetes Devices Market Analysis

The South Korea diabetes devices market is valued at USD 470.77 million in 2025 and is forecast to reach USD 545.77 million by 2030, reflecting a 3% CAGR as the market exits its rapid-expansion phase and enters steady, innovation-led growth. Demand remains resilient because 29.3% of adults aged 65 and older live with diabetes, a share that continues to rise as the population ages. Competitive intensity is sharpening as domestic manufacturers scale up, the National Health Insurance Service (NHIS) extends coverage for continuous glucose monitoring (CGM) and insulin pumps, and 5G-enabled telemedicine broadens access to specialist care. Simultaneously, strict reference pricing from the Health Insurance Review and Assessment Service (HIRA) is pressuring margins, compelling firms to localize production and recalibrate product portfolios. Market leadership is gravitating toward companies that pair hardware with artificial-intelligence software capable of predicting glycemic excursions, because outcomes-based reimbursement is gaining traction.

South Korea Diabetes Devices Market Trends and Insights

Rising Diabetes Prevalence and Earlier Age of Onset in South Korea

South Korea's diabetes prevalence has climbed to 15.5% among adults aged 30 and older, and 2.2% among adults aged 19-39, creating unprecedented lifetime demand for monitoring and delivery devices . Earlier onset means patients now spend more years using technology-enabled interventions, a pattern that lengthens device replacement cycles and raises cumulative revenue per patient. Roughly 87.1% of young adults with diabetes are obese, further increasing the need for continuous metabolic insight and prompting manufacturers to design low-profile, lifestyle-compatible CGM sensors. Awareness remains lower among young adults (43.3%) than seniors (78.8%), signaling untapped potential for targeted education and early screening programs that can lift device penetration. This demographic-driven demand is expected to keep the South Korea diabetes devices market on a stable upward trajectory even as price controls intensify.

Government Reimbursement Expansion for Advanced Glucose Monitoring and Insulin Delivery

NHIS began reimbursing CGM sensors and transmitters in 2019 and has since broadened eligibility for insulin pumps, reducing out-of-pocket costs and triggering a sharp rise in prescriptions across all age groups . Reimbursement now focuses on outcomes metrics such as time-in-range and hypoglycemia events, strengthening the business case for devices with proven clinical effectiveness. Earlier access to advanced tools is improving long-term glycemic control, which supports payer objectives to curb costly complications. The South Korea diabetes devices market is therefore seeing a pivot from single-function glucometers toward integrated monitoring-and-delivery ecosystems that align with payer priorities.

Stringent Pricing Controls and Reference Pricing Limiting Device Margins

HIRA benchmarks diabetes devices against reference countries, often granting reimbursement 30-40% below US and EU levels, squeezing returns on high-R&D products . CGM and pump makers confront a conundrum: South Korea's tech-forward market is ideal for showcasing innovation, yet margin realization lags. Firms respond by redesigning products with fewer bundled accessories, moving production to local plants, or adopting software-subscription models that shift revenue to post-sale services. Without structural change, low pricing will continually shadow the South Korea diabetes devices market.

Other drivers and restraints analyzed in the detailed report include:

Growth of Digital Health Ecosystem and 5G Connectivity Enabling Remote Diabetes Management / Increasing Adoption of Home-Based Self-Care Practices Among Aging Population / Domestic Med-Tech Manufacturing Investments Supported by K-Bio and Export Incentives / High Out-of-Pocket Costs for Advanced Insulin Pumps Despite Partial Reimbursement / Regulatory Delays for Novel Wearable and Implantable Sensors / Physician Preference for Established Therapies Slowing Uptake of Alternative Delivery Technologies /

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

Segment Analysis

Monitoring Devices account for 60.25% of 2025 revenue, underscoring their central role in real-time decision support across both Type 1 and insulin-treated Type 2 populations. Continuous glucose monitoring is the fastest-rising sub-segment as Korean Diabetes Association guidelines now recommend real-time CGM for all adults with Type 1 and for selected Type 2 cases. The South Korea diabetes devices market size for CGM is propelled by superior HbA1c reductions, with real-time users dropping from 8.9% to 7.1% versus intermittently-scanned users who fell from 8.6% to 7.5%. Local production by i-SENS lowers costs, potentially widening uptake.

Management Devices, while smaller today, are increasing at 4.2% CAGR and include patch pumps, traditional pumps, and connected pens that feed data to cloud dashboards. Domestic wearable-pump specialist EOFlow and multinationals Medtronic and Tandem are iterating closed-loop algorithms that adjust basal flow every five minutes, positioning the South Korea diabetes devices market for a coming wave of automated insulin delivery (AID) systems. Integration of CGM and pump data into unified apps is narrowing the functional gap between monitoring and management solutions, blurring category lines and encouraging ecosystem competition.

The Report Covers South Korean Diabetes Device Market Trends and is Segmented by Device Type (Monitoring Devices and Management Devices), by End User (Hospitals & Specialty Clinics, and Home-Care Settings), by Distribution Channel (Offline Pharmacies & DME Stores, and Online Channels). The Report Offers the Value (In USD) for the Above Segments.

List of Companies Covered in this Report:

Abbott Laboratories / Roche / i-Sens Inc. / Dexcom / Medtronic / Terumo Corp. / Ascensia / Arkray / Beckton Dickinson / Sanofi / Novo Nordisk / Eli Lilly and Company / Insulet / Ypsomed / Panasonic Healthcare (PHC Holdings) / Senseonics / B. Braun / Huons Co. Ltd. /

Additional Benefits:

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

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