

## **United States Diabetes Market Size, Share, Trends and Forecast by Segment, 2026-2034**

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### **Report description:**

The United States diabetes market size was valued at USD 31.09 Billion in 2025 and is projected to reach USD 39.80 Billion by 2034, growing at a compound annual growth rate of 2.78% from 2026-2034.

The United States diabetes market is experiencing steady expansion driven by the escalating prevalence of diabetes and prediabetes across the population, advancements in insulin delivery systems and continuous glucose monitoring technologies, and increasing adoption of personalized treatment protocols. Growing awareness regarding early disease detection combined with supportive reimbursement frameworks and the integration of digital health platforms into diabetes management are further contributing to the United States diabetes market share.

### **KEY TAKEAWAYS AND INSIGHTS:**

- By Segment: Insulin dominates the market with a share of 56.5% in 2025, driven by its essential role in managing both type 1 and advanced type 2 diabetes requiring intensive glycemic control.

o Key Players: The United States diabetes market exhibits a consolidated competitive structure with major pharmaceutical corporations commanding significant market presence. Leading manufacturers maintain dominance through extensive product portfolios spanning insulin analogs, oral antidiabetic drugs, and innovative delivery systems.

The United States diabetes market continues to evolve as healthcare providers and patients embrace innovative therapeutic approaches and advanced monitoring technologies. The market landscape reflects the critical intersection of rising disease burden and pharmaceutical innovation, with manufacturers investing substantially in next-generation treatments offering improved efficacy and patient convenience. According to the Centers for Disease Control and Prevention, approximately 38.4 million Americans have diabetes, representing 11.6% of the population, while an additional 97.6 million adults have prediabetes. This

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substantial patient base underpins sustained demand for diabetes medications and management solutions. The market benefits from robust research and development activities, strategic partnerships between pharmaceutical and technology companies, and evolving treatment paradigms that prioritize patient-centric care. Healthcare system investments in diabetes management infrastructure, coupled with favorable regulatory pathways for novel therapeutics, continue supporting market development across insulin and oral antidiabetic segments.

#### UNITED STATES DIABETES MARKET TRENDS:

##### Integration of Artificial Intelligence in Glucose Monitoring Systems

The diabetes management landscape is witnessing accelerated adoption of artificial intelligence-powered continuous glucose monitoring platforms that provide predictive analytics and personalized recommendations. These advanced systems analyze glucose patterns and lifestyle data to optimize insulin dosing and alert users to potential glycemic events. Dexcom launched its Generative AI platform for continuous glucose monitors in 2024, offering personalized tips based on glucose trends and lifestyle factors, initially available on its Stelo device with plans for broader implementation across its product portfolio. Such innovations support proactive self-management, improve engagement, and enable more informed clinical decision-making across daily diabetes care routines.

##### Expansion of GLP-1 Receptor Agonists for Dual-Purpose Treatment

Glucagon-like peptide-1 receptor agonists are fundamentally reshaping diabetes treatment strategies by offering simultaneous benefits for glycemic control and weight management. These medications address the metabolic syndrome connection between diabetes and obesity, providing clinicians with versatile therapeutic options. The FDA approved oral semaglutide formulations expanding treatment accessibility, while pipeline developments include next-generation dual and triple agonist compounds promising enhanced efficacy for patients requiring comprehensive metabolic management. Ongoing research also focuses on improved tolerability, simplified dosing regimens, and broader patient suitability across varied stages of disease progression.

##### Growth of Biosimilar Insulin Products Improving Market Accessibility

The biosimilar insulin segment is gaining momentum as regulatory approvals expand product availability and competitive pricing improves patient access to essential diabetes medications. These products offer clinically equivalent alternatives to reference biologics while reducing healthcare expenditure barriers. In February 2025, the FDA approved Merilog, as the first rapid-acting insulin biosimilar referencing Novolog, joining previously approved long-acting biosimilars and expanding treatment options for patients requiring mealtime insulin coverage. Growing clinician confidence, streamlined prescribing pathways, and wider formulary inclusion continue to support adoption across hospitals, clinics, and outpatient care settings, strengthening long-term treatment continuity for diverse patient populations.

#### MARKET OUTLOOK 2026-2034:

The United States diabetes market continues to present solid growth opportunities, supported by ongoing advances in medical technology, broader therapeutic development efforts, and sustained focus on improving patient outcomes. Industry participants are prioritizing innovation across insulin delivery, glucose monitoring integration, and next-generation drug formulations to address long-standing treatment gaps and improve daily disease management. Smart delivery devices and automated insulin systems are becoming more refined, helping patients achieve better control with reduced burden. Pharmaceutical companies are also strengthening pipelines with therapies designed for improved convenience, tolerability, and long-term use. Alongside innovation, policy measures aimed at improving affordability have helped ease access challenges for many patients who rely on insulin therapy. These changes support better adherence and continuity of care, particularly among older populations. Combined,

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technological progress, therapeutic diversification, and supportive reimbursement structures are shaping a market environment that encourages adoption of modern diabetes solutions while reinforcing long-term sustainability for providers, payers, and patients across care settings. The Inflation Reduction Act's provisions capping insulin costs at thirty-five dollars monthly for Medicare beneficiaries have enhanced treatment accessibility for millions of patients. The market generated a revenue of USD 31.09 Billion in 2025 and is projected to reach a revenue of USD 39.80 Billion by 2034, growing at a compound annual growth rate of 2.78% from 2026-2034.

#### UNITED STATES DIABETES MARKET REPORT SEGMENTATION:

Segment Category

Leading Segment

Market Share

Segment

Insulin

56.5%

#### SEGMENT INSIGHTS:

- o Insulin

- Oral Antidiabetics

The insulin dominates with a market share of 56.5% of the total United States diabetes market in 2025.

Insulin remains a central component of diabetes treatment, playing a vital role for all individuals with type 1 diabetes and for many people with type 2 diabetes who need tighter blood glucose control. Its broad range of formulations allows clinicians to tailor therapy according to lifestyle, disease progression, and daily glucose patterns. Available options include rapid-acting and short-acting insulins for mealtime coverage, along with intermediate and long-acting types that support basal glucose regulation throughout the day and night. Among these, long-acting insulin analogs continue to see wide clinical use due to their ability to deliver consistent background insulin levels with simplified dosing schedules. Once-daily administration helps reduce treatment burden, supports routine adherence, and lowers the risk of unexpected glucose fluctuations. These advantages make long-acting formulations suitable for long-term management and combination therapy approaches. Overall, insulin's flexibility, reliability, and clinical effectiveness reinforce its ongoing importance across diabetes care pathways, supporting individualized treatment strategies and stable glycemic management across diverse patient populations.

The insulin segment benefits from continuous innovation in delivery mechanisms including smart insulin pens with dose-tracking capabilities, automated insulin pumps, and closed-loop artificial pancreas systems. According to the Centers for Disease Control and Prevention, type 1 diabetes and insulin use were reported by 1.7 million persons 20 years of age or older, or 5.7% of all adults with diabetes in the United States, underpinning sustained market demand. Manufacturers are advancing ultra-rapid-acting formulations and once-weekly insulin options such as insulin icodec to enhance patient convenience and improve glycemic outcomes through simplified treatment regimens.

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## MARKET DYNAMICS:

### Growth Drivers:

#### Why is the United States Diabetes Market Growing?

##### Rising Diabetes Prevalence Across Demographic Groups

The escalating prevalence of diabetes across the United States population represents a fundamental driver sustaining market expansion. Lifestyle factors including sedentary behaviors, dietary patterns characterized by processed food consumption, and increasing obesity rates contribute to the growing disease burden. The aging population demographic further amplifies diabetes incidence as metabolic dysfunction becomes more prevalent with advancing age. According to the World Health Organization (WHO), with the Fourth High-level Meeting of the United Nations General Assembly on the prevention and management of noncommunicable diseases (NCDs) scheduled for September of 2025, there is a great chance to spur action against the concerning global rise in diabetes.

##### Favorable Reimbursement Policies and Affordability Initiatives

Supportive reimbursement structures and affordability programs have made diabetes treatments more accessible to patients across income groups. Regulatory actions, pricing oversight, and collaborative efforts by manufacturers have eased financial pressure on users requiring long term therapy. These measures encourage consistent treatment adherence, reduce access barriers, and support sustainable availability of essential medicines. By addressing cost related challenges, healthcare systems create conditions that balance patient needs with industry participation, allowing wider reach of diabetes medications and reinforcing trust in treatment continuity across public and private healthcare settings.

##### Technological Advancements in Drug Delivery Systems

Innovation in insulin delivery technologies continues transforming diabetes management through enhanced precision, convenience, and automation capabilities. Smart insulin pens with digital connectivity enable dose tracking and integration with mobile health applications for comprehensive diabetes management. Automated insulin delivery systems combining continuous glucose monitors with insulin pumps provide closed-loop glucose control. In March 2025, Tandem Diabetes Care launched its Control-IQ+ automated insulin delivery technology in the United States, expanding access to individuals aged two and older with type 1 diabetes and adults with type 2 diabetes, offering enhanced personalization features.

### Market Restraints:

#### What Challenges the United States Diabetes Market is Facing?

##### Ongoing Pricing Pressures and Affordability Issues

The cost forces remain a concern for the accessibility of diabetes care due to the need for a balance by the various stakeholders in respect to the costs associated with innovation for the benefit of the patient. Patients without adequate insurance cover may encounter increased individual costs, thus restricting the treatment options as well as the continuity of the required medications. These factors could impact patient compliance and the management of the condition in the country.

##### Stringent Regulatory Requirements and Approval Timelines

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The regulatory processes in treating diabetes through drugs and technology require a lot of clinical testing, safety assurance, and adherence documentation. This process, despite being lengthy, might lead to a delay in making new treatments available in the market. These processes might affect market adaptability in responding to consumer needs, market accessibility, pricing, and the adoption rate of new technologies in the market.

#### Insurance Coverages' Limitations and Prior Authorization Barriers

Variations in the authorization of insurance coverage for some diabetes drugs also still affect access. Even the approval processes take longer and can delay the start of treatment for patients. It becomes even harder for diabetic patients to maintain continuous treatment and ensure personalization of the treatment regimen when treatment begins with delays.

#### COMPETITIVE LANDSCAPE:

The United States diabetes market has a very tightly concentrated competitive structure, comprising large pharmaceutical corporations with established market presence across various insulin drugs, oral medications, and sophisticated drug delivery systems. Their advantage lies in their extensive research and development capacities and manufacturing and distribution networks. Funding for continuous enhancement and management across the therapy product lifecycles helps them reinforce market presence. Competitive dynamics are driven by strategic alliances, filtered acquisitions, and licensing transactions to improve market presence. Barriers to entry are driven by significant development investments, stringent regulatory and quality standards, and time-consuming and costly validation and approvals. However, biosimilar manufacturers are slowly but steadily establishing a foothold to offer providers and clients additional options. This presence triggers price competition and marginal changes in prescribing practices. However, there are tight competitive dynamics, heavily driven by innovation and dominated by few deeply capitalized market players, with slow but increasing pressure from fledgling market entrants concentrated on biosimilars.

#### KEY QUESTIONS ANSWERED IN THIS REPORT

1. How big is the United States diabetes market?
2. What is the projected growth rate of the United States diabetes market?
3. Which drug class held the largest United States diabetes market share?
4. What are the key factors driving market growth?
5. What are the major challenges facing the United States diabetes market?

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