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U.S. Markets for Diabetes Management Products
Report #A376 - May 2009
247 Pages – 78 Exhibits – 13 Key Company Profiles

6/20/2011

Diabetes affects nearly 24 million people in the U.S. and an estimated 246 million adults worldwide and is the 5th leading cause of death by disease in the U.S. It is also one of the most expensive diseases, costing the U.S. healthcare system more than \$130 billion per year. In order to constrain spiraling healthcare costs and limit the progression of full-blown type 2 diabetes and its complications among an aging and increasingly obese population, the development of more affordable and effective diabetes management (self-testing and treatment) products has become a top priority not only in the U.S., but worldwide.

Due to demographics, strong demand, and other factors, the diabetes management products market—including blood glucose monitoring systems, insulin injection devices and insulin pumps, insulin therapies and oral and injectable diabetes drugs—has become one of the largest medical device and pharmaceutical markets in the U.S., totaling more than \$15 billion. As the population of diabetics continues to increase, the market is expected to continue to grow at a double-digit rate over the next five years, reaching nearly \$28 billion by 2013.

Monitoring glucose levels is critical for the management of diabetes and new and improved portable, less costly, easy-to-use, accurate and virtually painless blood glucose monitoring systems are now available. In addition, new and improved insulin pens are enabling less painful and burdensome daily injection of insulin, helping to spur insulin therapy sales.

In the blood-glucose lowering treatment area, several new drugs, such as Byetta and Januvia have exhibited good safety and efficacy profiles and have reached blockbuster status over the last few years, despite the economic troubles in the U.S. and worldwide. In addition, a substantial number of emerging diabetes drugs are under clinical study by dozens of startup companies and large pharmaceutical companies; with several expected to enter the U.S. market over the next few years. Next-generation diabetes drug therapies are promising to addressing the strong need for safer, long-term blood glucose control, used as monotherapies or in combination with insulin or other oral diabetes drug therapies.

This dynamic, new report from Medtech Insight includes analyses of products, markets, competitors, and opportunities in the U.S. diabetes products market. Product areas include: self-testing blood glucose monitoring systems, continuous blood glucose monitoring systems, insulin therapies, insulin injection devices, insulin pumps, injectable/oral diabetes drugs, and emerging diabetes drugs and technologies, including pancreatic islet cell transplantation.

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Methodology

Reports are produced exclusively by Medtech Insight, through extensive primary and secondary research among the clinicians, researchers, and competitors in the marketplace, and draw upon the industry expertise of a network of industry insiders. Medtech Insight exhaustively corroborates the data as a baseline for completing forward-looking analysis and providing insight into product, technology and market evolution.

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