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How India's Diabetes Crisis is Driving Med Devices Market

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A growing diabetic population in India is a blessing for the care devices market. Both Indian and global diabetes care devices have taken this growing demand for various devices, kits as an opportunity to expand their market share. But the scope in rural areas seems a bit challenging for various companies due to less awareness about the disease, affordability etc. Let's look at this growing diabetes care devices market.

With diabetes seeing an uptick and India being the Diabetes Capital of the World, the diabetes care devices market is experiencing robust growth. A GlobalData analysis reveals that India accounted for around 20 per cent of the Asia-Pacific (APAC) diabetes care devices market in 2024, driven by a confluence of factors, including a rapidly escalating diabetic population, increased diagnosis, rising disposable incomes, and the adoption of advanced diabetes management technologies.

According to Frost & Sullivan analysis, the Indian diabetes care devices market is currently estimated at $4.8 billion and will reach $7.7 billion in 2030 with a projected compounded annual growth rate (CAGR) of approximately 9 per cent for the projected period of 2026-2030.

The digital health platforms segment reflects its high growth potential and encompasses a range of interconnected technologies, services, and applications. Its key components are mobile health (mHealth) apps for medication nudges and diet and exercise logs, teleconsultation and remote patient monitoring packages, predictive analytics for personalised medicine, and patient data management software. The segment will experience rapid adoption, driven by India's high smartphone penetration, the government's initiatives like the India AI mission, and growing Internet connectivity.

Key growth drivers

Rising disease prevalence, increased health awareness, strategic partnerships in the private sector, technological advancements, insurance and corporate wellness inclusion, E-commerce and telehealth penetration.

According to Frost and Sullivan, government initiatives such as Ayushman Bharat undertake population-based screening for non-communicable diseases like diabetes in individuals over 30 years of age by trained frontline workers, have helped the sector to flourish.

Other growth factors are the Government e-Marketplace (GeM) procurement and the Production Linked Incentive (PLI) Scheme encourage local manufacturing and ensure the accessibility of the technologies to the masses. Recent Goods and Services Tax (GST) reforms reduce tax burdens on the value and supply chains for medical devices used in diabetes care in India, including glucometers and test strips, to 5 per cent from 12–18 per cent. The complete exemptions for diabetes devices and treatments under health insurance have made coverage more affordable and accessible for people managing chronic conditions like diabetes can also be attributed.

Major Players

With rising cases of diabetes patients, a more obese population, rapid urbanisation etc. are acting as a catalyst for the devices market, where players are making a beeline to launch products.

Advancements in technology, like continuous glucose monitoring (CGM) to monitor glucose levels, have made diabetes management simpler. Despite the high prevalence, self-monitoring of blood glucose (SMBG) remains low due to pain and inconvenience, often resulting in poor glycemic control and increased complications. CGM addresses these barriers by offering painless, real-time, and connected glucose tracking. Evidence shows CGM improves HbA1c, reduces hypoglycemia, and increases time-in-range, enabling proactive and personalised care.

Roche Diabetes Care is transforming traditional SMBG from a mere measurement into a meaningful, proactive management tool through its connected ecosystem. Its strategy centres on the seamless integration of its highly accurate Accu-Chek blood glucose meters with the user-centric mySugr app. This integration is innovative because it addresses the critical challenge of manual data logging and analysis, making diabetes management less burdensome.

The mySugr app automatically captures blood glucose readings via wireless transfer, ensuring consistent and accurate data without the need for manual transcription, which significantly helps in improving patient adherence to testing protocols. The app acts as a smart logbook, allowing patients to easily record key factors like meals, activity, and insulin doses alongside their readings. It then generates visual trends, daily averages, and an estimated A1c, providing actionable insights that are far more effective for therapy adjustments than simple paper records. By easily generating detailed, organised digital reports, the system enables a more productive and focused dialogue between the patient and their healthcare professional (HCP), leading to truly personalised and timely care decisions.

Vaibhav Kohli, Head- Marketing, Access and Commercial Excellence, Roche Diagnostics India & Neighbouring Markets mentions, "We recognise that successfully deploying digital glucose monitoring solutions in India requires overcoming specific local challenges. We are focussed on bridging the digital literacy and infrastructure gap. We are committed to investing in educational programmes and user-friendly interfaces to simplify the digital experience and ensure that the benefits of connected SMBG are realised, even in regions with lower digital fluency. We want to build stronger partnerships with healthcare professionals and diabetes educators to provide the necessary support and coaching, ensuring that the technology translates into improved clinical behaviour and, ultimately, better glycemic control."

We have another product called Tracky, a healthtech brand by DrStore Healthcare Services, which was launched recently, is positioned as India’s first Bluetooth-enabled CGM. The device, according to the company, is all set to transform diabetes care and preventive health management.

Equipped with real-time Bluetooth connectivity, Tracky enables automatic syncing with the Tracky Health App every three minutes. It is a scan free solution that delivers instant glucose readings and customizable alerts for high or low levels to empower each user to take timely action without manual intervention. It enhances convenience, accuracy, and consistency to make it easier to manage diabetes on the go.

We have another company called BeatO, which aims to positively impact the lives of over one crore Indians living with diabetes by 2026. BeatO's ecosystem includes its innovative app that works with smart glucometers to provide personalised care insights and 24x7 access to an experienced team of medical experts - top diabetologists, health coaches, and nutritionists.

In addition to the local firms, multinationals such as Abbott, Eli Lilly too are active in this field. Abbott has launched FreeStyle Libre 2 Plus sensor, its latest addition to the FreeStyle Libre sensor portfolio. The innovative device offers automatic glucose readings every minute straight to one’s phone, empowering people with diabetes to manage their condition with confidence, precision, and ease. The device offers 14 days of continuous glucose monitoring via a small sensor worn on the upper arm. It

provides a comprehensive glucose profile through easy scanning, eliminating routine finger pricks.

Studies show that FreeStyle Libre technology can help reduce low blood sugar episodes by up to 43 per cent, a 0.9 per cent to 1.5 per cent drop in HbA1c levels, and even cut hospital visits by 66 per cent. Libre technology has been shown to reduce cardiovascular complication risk by 78 per cent in people with Type 1 diabetes post-severe hypoglycemia, and lower hospitalisation risk for stroke and diabetes-related complications by 44 per cent in insulin-treated Type 2 diabetes.

Eli Lilly has launched Mounjaro KwikPen to advance care for adults with Type 2 diabetes and obesity in India. Mounjaro KwikPen is a multi-dose, single-patient-use prefilled pen. Each pen contains four fixed doses, administered once weekly. The pen will be available in six dose strengths: 2.5 mg (Rs 14,000), 5 mg (Rs 17,500), 7.5 mg (Rs 22,000), 10 mg (Rs 22,000), 12.5 mg (Rs 27,500), and 15 mg (Rs 27,500), allowing healthcare professionals to personalise treatment plans to better suit individual patient needs.

Dexcom, an American healthcare company that develops, manufactures, produces and distributes a line of CGM systems for diabetes management, opened operation in India last year in Bangalore and provides the G6 CGM System that sends real-time glucose readings automatically to a compatible smart device or Dexcom receiver. It features a 10-day sensor that is easy to use. The device gives the freedom to manage your diabetes with zero fingersticks or calibrations.

Incorporated in 2019 by second time entrepreneurs Mohit Kumar and Vatsal Singhal, Ultrahuman, a Bengaluru-based longevity and health-monitoring platform that designs, manufactures and sells the Ultrahuman Ring Air health tracker, Ultrahuman M1 CGM, pre-release Ultrahuman Home health monitor and related blood testing services like blood vision, provides M1, which has been developed in collaboration with top metabolic health experts and athletes to accurately measure the metabolic performance using glucose as a biomarker. It helps to track glucose trends in real-time with an app.

Actofit, a wearable technology company from Mumbai that offers a range of health and fitness products, including smartwatches, smart scales, and a CGM system called Pro Plus, provides continuous glucose monitoring, streams the data to the Actofit Health App in real time. The glucose biosensor helps to unlock key recovery and performance nutrition insights. The app provides data-backed nutrition planning.

Medtronics, a global leader in medical technology, services, and solutions launched MiniMed 780G system in India in 2022, a closed-loop insulin pump system for the treatment of Type 1 diabetes in people aged seven to 80 years. The system automates the delivery of both basal insulin and correction boluses every five minutes to help people with diabetes avoid highs and lows with greater ease.

Trivitron, a medical technology company from Chennai providing affordable healthcare solutions offers NANO H5, a fully automated High Performance Liquid Chromatography (HPLC) analyser. It is compact, uses Ion exchange liquid chromatography for quantitative determination of the glycated hemoglobin (HbA1c) in human whole blood. The NANO H110 is a compact, automated HPLC analyzer with Hb variant detection.

Circa Validio Blood Glucose Monitoring System by Eris Lifesciences helps to monitor the blood glucose level. The system can store up to 300 test results and comes with a large display.

Biorad Medisys, a Pune-based medical device manufacturing company with a focus on orthopedic, neurovascular, and endoscopic solutions, provides automated HPLC systems, the D-10, for high-performance liquid chromatography. The method separates and quantifies different forms of haemoglobin, including HbA1c, to help monitor blood sugar control over time. The company also offers a range of human whole blood-based controls, including Liquichek and Lyphochek. These are used to assess the precision of haemoglobin testing and ensure the accuracy and reliability of diabetes diagnostic results in clinical labs. Besides, it also offers InteliQ.

Research work

Sun Life Global Solutions (SLGS), the Global Capability Centre of Sun Life— one of the leading international insurance and asset management companies, has announced a groundbreaking research collaboration with the Indian Institute of Technology Madras (IIT Madras) with an aim to ease the burden of diabetes in India.

The joint initiative is focussed on transforming early diagnosis and management of type 2 diabetes through the identification of Pancreastatin as a novel biomarker, along with genetic testing.

The research, led by Dr Nitish R Mahapatra, Professor, Department of Biotechnology and BJM School of Biosciences at IIT Madras, aims to establish Pancreastatin as a reliable early indicator for pre-diabetes—a crucial step in preventing disease progression. The study will also investigate 10–12 genetic markers that may help predict diabetes risk years in advance, even in children.

A research team at the National Institute of Technology (NIT) Rourkela has developed a new artificial intelligence (AI)-driven approach to improve blood sugar predictions for people with diabetes. The research presents a machine-learning model that enhances the accuracy of blood glucose level prediction, helping individuals and healthcare providers make better and personalised treatment decisions.

Challenges

Despite a good future, various challenges are plaguing the diabetes device care market. The first and foremost being the high cost and affordability issues. Devices like pumps, insulin pens are costly, resulting in many shying away from purchasing the products.

Says **Dr Vivek Iyer, Head, Medical Affairs, Abbott's Diabetes Care Division for South Asia,** "While awareness of diabetes is growing and technology is advancing rapidly, one of the key challenges is the perception that tools like CGMs are only relevant for people living with Type 1 diabetes. In reality, CGMs offer significant benefits for all individuals living with diabetes, including those with Type 2. The market remains largely treatment-centric, with medication at the forefront, while monitoring tools are still underutilised. CGMs like FreeStyle Libre empower users with real-time insights that drive meaningful behaviour changes — from dietary choices to physical activity — leading to small wins that improve long-term outcomes. The opportunity lies in shifting from reactive care to proactive management, where consistent management becomes a cornerstone of a healthy and full life."

In another scenario, the rural hinterlands of India have seen minimal penetration of medical devices. This may be due to a lack of proper information about the disease, resulting in low purchases. In some instances, primary healthcare centres lack the basic infrastructure for storing these high-end gadgets.

Regulatory issues, data privacy etc. are some of the other challenges. While policy frameworks like the Digital Personal Data Protection Act (DAPA Act), enacted in 2023, mark an important step toward strengthening India's data governance, the legislation still lacks clear provisions to address the privacy and cybersecurity complexities unique to medical devices. As connected diabetic care increasingly relies on continuous data transmission, from wearable sensors and glucometers to cloud- based analytics platforms, the risks of data breaches, unauthorised access, and algorithmic misuse remain.

Swati Mishra, Research Analyst, TechVision, Frost & Sullivan, mentions, "India does not have a dedicated regulatory body or harmonised framework to oversee digital health devices' cybersecurity compliance, interoperability, and data ownership norms. In the context of the diabetes device market, this gap becomes particularly critical. To ensure long-term trust and scalability, India needs cross-sectoral regulatory coordination between the Ministry of Electronics & IT (MeitY), the Central Drugs Standard Control Organisation (CDSCO), and the National Health Authority (NHA) to establish unified guidelines for data protection, device certification, and cyber resilience in healthcare Internet-of-Things (IoT) and wearable technologies. Only through such integrated oversight can India balance innovation with accountability, ensuring that its digital health revolution, led by connected diabetes care, remains inclusive and secure."

Outlook

Through 2030, the market's trajectory will be shaped by rising awareness around early detection and self-management, technological advancements, including AI-powered glucose monitoring and mobile health platforms and shifts in consumer behaviour, with increasing adoption of home-based care and digital therapeutics.

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