

R2G

Research 2 Guidance



THE GLOBAL DIGITAL DIABETES CARE MARKET 2020

GOING BEYOND DIABETES MANAGEMENT

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Market Size, Key Players, Top 10 Countries, Trends, Outlook

4th edition, November 2020

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Digital Diabetes Care Market Report 2020

WHAT IS THIS REPORT ABOUT?



This report is the fourth edition of the Diabetes App Market Report, with three previous editions having been published in 2014, 2016, and 2018.

Diabetes is a global epidemic

- 463 million people suffered from it in 2019 (IDF)
- Diabetes is one of the major cost drivers in the healthcare systems of countries most affected by the epidemic
- Global spending for diabetes related care amounts to more than \$760b in 2019 (IDF)

Digital diabetes solutions have disrupted the diabetes care market and are changing overall chronic care, targeting not only diabetes but also its various comorbidities, such as obesity, hypertension, and depression.

The 2020 report focuses on **the continued expansion of digital diabetes providers into other chronic conditions (vertical expansion) and new service opportunities (horizontal expansion), highlighting the market's strategic direction in the next few years.** This expansion will create new revenue opportunities, improve payer acceptance, and grow user bases beyond the diagnosed diabetes audience.

The report analyzes in detail the **current market structure** (user demand, service offerings, market segments) and how companies are exploiting the market opportunity (competition levels, market shares, market leaders). **Market leaders are profiled**, with insights about their perceived strategies, service offers, and performance provided.

The report pays special attention to **trends that have shaped the industry over the last two years**, such as the expansion of continuous glucose monitoring systems (CGMs), the increasing importance of diabetes device vendors in the digital diabetes market, the expansion of digital diabetes providers beyond diabetes management, and the emergence of new reimbursement opportunities for diabetes care providers.

The current and future market (outlook) analysis highlights key market KPIs, including the following:

- The size of the **addressable market** for digital diabetes care solutions
- Various metrics that show the size and development of the demand and supply side of the market: **the number of diabetes solutions, their downloads, active users, as well as diabetes solution providers.**
- A breakdown of current and future revenue streams from **digital content, services (including coaching), bundles, technology licencing, and advertising and promotion.**

IN A NUTSHELL

- ✓ Full market study report
- ✓ Market history 2008-2019
- ✓ 5-year forecast 2019-2024
- ✓ Key trends
- ✓ HCP and payer services
- ✓ Top 10 countries
- ✓ Top 10 digital solution providers
- ✓ 92 pages
- ✓ 22 figures
- ✓ 30 tables
- ✓ Published November 2020
- ✓ 4th edition

ABOUT R2G

Research2Guidance is a strategy advisory and market research company.

We support business in digital healthcare and ultimately improve the way healthcare services are delivered globally.

We provide market and competitor insights (research) and strategy advice (guidance).

Since 2010, we have empowered digital health innovators and supported their missions for better healthcare.



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DATA-DRIVEN REPORT FULL OF METRICS, ANALYSIS, AND INSIGHTS

Graphics and illustrations highlight market insights, business model strategies, trends, and forecasts. It is a very data-driven report, with a high level of detail. To ease reading, each chapter is headed by a short summary.

DIGITAL SERVICES

Current offerings



MARKET STRUCTURE

Year 2010-19



FORECAST

Years 2020-2024



TRENDS

Top 10



Profiles are used to describe top 10 countries and top 10 market players with their digital service offerings. Company profiles show market performance, business model and perceived digital strategy. Country profiles help to identify market opportunities for business growth.

COUNTRIES PROFILED



1. The United States
2. India
3. Russia
4. Brazil
5. The United Kingdom
6. Germany
7. France
8. Japan
9. Italy
10. Mexico

COMPANIES PROFILED



1. LifeScan
2. Ascensia
3. One Drop
4. mySugr
5. H2
6. Livongo Health
7. Omada Health
8. Abbott
9. Dexcom
10. Dario Health

COMPANY PROFILES

Service offerings, connected devices, performance, strategy



COUNTRY PROFILES

Demographics, Downloads & Publishers



Questions the report answers:



- What is the current status of the digital solutions available in the market?
- Which countries offer the largest market?
- What are market prices for digital content, coaching services, or bundles?
- What are the key market players, and what is their perceived strategy?
- What are key trends that drive the market?
- What is the potential size of market revenues?

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ABOUT RESEARCH2GUIDANCE

“We believe that digital health innovations will have a significant impact on the life of every human being, and they have already started transforming the healthcare industry. We support established healthcare companies and start-ups with insights, strategic advice, and hands-on partnership building.”

R2G exists to support digital healthcare and ultimately improve the way healthcare services are delivered globally.

We do this by providing market and competitor insights (research) and strategy advice (guidance). We facilitate partnerships creation between best-in-class innovators and established healthcare companies and help to align their service offerings and business models.

We strive for excellence in all we do. Our consultants are 100% dedicated to digital health.

Based in Berlin, we work on projects around the world. We support traditional healthcare companies, such as pharmaceutical, health insurance or med-tech companies, medical institutions, as well as start-ups and enterprises that want to enter the healthcare market by using digitally enabled business models and solutions.

Our *mHealth Developer Economics* research program and panel are the largest of their kind across the global digital health industry. The research program tracks the current market status and examines the progression of trends since 2010. To give something back to the growing digital health business community, we share results of the research program in our yearly publications.

Since 2010, we have empowered digital health innovators and supported their missions for better healthcare.

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