

Diabetic Health - US - September 2018

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"As increasingly more Americans face a diabetes diagnosis, demand is growing for effective, reliable and affordable tools to screen, monitor, and manage diabetes. The disease is complex and often overwhelming, not to mention costly for individuals and society alike."

– **Marissa Gilbert, Associate Director - Health & Wellness**

This report looks at the following areas:

Opportunities are especially ripe for the integration of less invasive monitors, digital sensors and integrated health management platforms that can simplify and streamline care for patients.

- The diabetic market is small, but likely underrepresented
- Managing diabetes can be costly and overwhelming, notably for type 1 diabetics
- OTC private label products command growing share of MULO sales

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Diabetes incidence limited; undiagnosed cases could be masking real size of the market

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The annual cost of diabetes in the US tops \$327 billion

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The adult diabetes market is small; undiagnosed cases understate actual size of the market

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Private label expands reach, especially in home kits and testing

Glucose monitoring devices lead OTC sales

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Mobile apps and smart meters for care and health management

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National brands losing shares in MULO to value brands

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"Smart" products and digital innovations are changing diabetes care

Longer-term implantable CGMs

Skin patches and tattoos may offer non-invasive glucose monitoring options

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Smart contact lenses may help monitor glucose
Wearable tooth sensors may measure intake of sugar, salt, and alcohol
Smart footwear for diabetics to offer better support and biometric feedback
DNA testing and stem cell therapies in development

The Consumer – What You Need to Know

Over half of diabetics are exercising and seeking to lose weight
Prescription medication and glucose monitoring widely used tools
Use of monitors and insulin highest for type 1 diabetics
Healthcare professionals are top source of guidance
Overall barriers to management are limited; but spike among type 1 diabetics
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Over half of diabetics are exercising and seeking to lose weight
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Abbreviations

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