

# **Global Urinary Incontinence Devices Market Size Study & Forecast, by Product (Urinary Catheters (Indwelling Catheters, Intermittent Catheters), Artificial Urinary Sphincters), Incontinence Type (Stress), Patient Type (Male, Female), End User (Hospitals) and Regional Forecasts 2025-2035**

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## **Abstracts**

The Global Urinary Incontinence Devices Market is valued at approximately USD 4.22 billion in 2024 and is anticipated to grow at a CAGR of more than 11.20% over the forecast period 2025-2035. Urinary incontinence, an often-overlooked yet highly prevalent condition, has increasingly been brought into the spotlight due to rising awareness, a growing geriatric population, and shifting patient attitudes towards seeking advanced medical solutions. Devices designed to manage urinary incontinence, such as urinary catheters, artificial urinary sphincters, and specialized hospital-based systems, are transforming the quality of life for millions globally. The demand for these devices is being propelled by the rising prevalence of urological disorders, post-surgical complications, and lifestyle changes that exacerbate bladder control issues. In addition, technological innovation in minimally invasive devices and improved patient compliance solutions is reshaping the market landscape, compelling stakeholders to push forward with investments and expansions.

With the rising number of patients suffering from stress incontinence and related bladder dysfunctions, the need for efficient, durable, and patient-friendly devices has surged significantly. According to the International Continence Society, urinary incontinence affects over 200 million people worldwide, with a disproportionate impact on aging women. This growing patient pool has encouraged medical device manufacturers to broaden their portfolios, invest in innovation, and strengthen their

presence across hospital networks and clinical practices. Moreover, government support in healthcare infrastructure development, combined with reimbursement policies in several developed economies, has further driven adoption. While the market faces challenges from the social stigma surrounding incontinence and the availability of conservative treatment options, the consistent rise in surgical procedures, coupled with the integration of smart healthcare technologies, opens a fertile ground for growth.

Regionally, North America commanded the largest share of the market in 2024 owing to its advanced healthcare ecosystem, strong presence of leading market players, and growing awareness campaigns focused on women's health and geriatric care. The U.S. in particular continues to spearhead innovation and adoption with robust clinical research, favorable reimbursement policies, and an expanding elderly demographic. Meanwhile, Europe maintains a significant footprint, backed by a high prevalence of incontinence cases and an established network of healthcare providers offering advanced solutions. Asia Pacific, however, is expected to be the fastest-growing region during the forecast period. The surge can be attributed to rapid urbanization, expanding healthcare infrastructure, and a growing patient population in countries like China, India, and Japan. Additionally, shifting social attitudes and increased healthcare expenditure in these regions are fostering demand for urinary incontinence devices. Latin America and the Middle East & Africa also present notable opportunities, albeit at a slower adoption rate, as healthcare modernization gradually expands access to advanced treatments.

Major market players included in this report are:

Hollister Incorporated

Medtronic plc

Boston Scientific Corporation

Coloplast A/S

Teleflex Incorporated

B. Braun Melsungen AG

Djo Global Inc.

C.R. Bard, Inc. (A Becton, Dickinson Company)

Pfizer Inc.

Stryker Corporation

ConvaTec Group PLC

Roche Holding AG

Cook Medical, Inc.

Promedon Group

Kimberly-Clark Corporation

#### Global Urinary Incontinence Devices Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to

incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Product:

Urinary Catheters

- Indwelling Catheters

- Intermittent Catheters

Artificial Urinary Sphincters

By Incontinence Type:

Stress

By Patient Type:

Male

Female

By End User:

Hospitals

By Region:

## North America

U.S.

Canada

## Europe

UK

Germany

France

Spain

Italy

Rest of Europe

## Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

## Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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