

Global External Catheter Market - 2025 -2033

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Abstracts

External Catheter Market Size

In 2023, the global external catheter market was valued at US\$ 1.60 Billion. The global External Catheter market size reached US\$ 1.69 Billion in 2024 and is expected to reach US\$ 2.82 Billion by 2033, growing at a CAGR of 6.0% during the forecast period 2025-2033.

External Catheter Market Overview

The global external catheter market is experiencing steady growth, primarily driven by the rising prevalence of urinary disorders and a rapidly aging population, particularly in developed economies. Technological advancements in catheter design and antimicrobial coatings are enhancing patient comfort and infection control, while the growing demand for home care and minimally invasive procedures further fuels adoption.

Opportunities abound in the form of antimicrobial and reusable external catheters, which address hygiene and sustainability concerns. Additionally, expansion into emerging markets is accelerating due to improving healthcare access and increasing awareness, supported by strategic collaborations and educational campaigns. North America currently dominates the market, due to the advanced healthcare infrastructure and high awareness, while the Asia-Pacific region is emerging as the fastest-growing market, driven by rising healthcare expenditure, aging demographics, and increased focus on patient-centric urological care.

External Catheter Market Dynamics: Drivers & Restraints

Drivers:

Rising prevalence of urinary disorders & aging population are significantly driving the external catheter market growth

The rising prevalence of urinary disorders, especially among the aging population, is playing a major role in driving the growth of the external catheter market. As conditions like urinary incontinence, benign prostatic hyperplasia, diabetes, and neurological diseases become more common with age, the need for reliable and non-invasive urinary management solutions is increasing rapidly. Older adults, particularly those in nursing homes or receiving home-based care, often require long-term support for managing incontinence comfortably and safely.

With the global population aged 65 and older growing at an unprecedented rate, healthcare systems are placing more emphasis on solutions that support dignity, reduce caregiver burden, and minimize hospital readmissions. For instance, according to the latest UN data, the old age population above 65 is projected to grow to 1.7 billion by 2054. Asia, the world's most populous continent, is experiencing a major demographic shift, with its elderly population projected to more than double in the coming years. As a result, demand for advanced, easy-to-use external catheters is expected to rise significantly in the years ahead, making this segment a key focus for innovation and investment.

According to projections by the United Nations, the global population aged 60 years and above is expected to rise significantly in the coming decades. In 2017, there were approximately 0.96 billion individuals over the age of 60. This number is forecasted to more than triple by the year 2100, reaching around 3.1 billion. A notable milestone will be crossed by 2050, with the elderly population expected to reach 2.1 billion, driven largely by advancements in healthcare and increasing life expectancy. This demographic shift underscores the growing need for elderly-focused medical solutions, such as external catheters, to manage age-related health conditions like urinary incontinence more effectively.

Technological innovations in catheter design & coatings are significantly driving the external catheter market growth

Technological innovations in catheter design and coatings are playing a crucial role in driving the growth of the external catheter market. Modern design improvements, such as more ergonomic and form-fitting shapes, offer better adhesion and minimize the risk of leakage, making them more reliable and comfortable for daily use. At the same time,

advancements in coating technologies are helping to reduce skin irritation, prevent infections, and maintain better hygiene. These features are especially important in long-term care and home settings, where users often rely on catheters for extended periods.

For instance, Ur24Technology Inc., a privately held medical device company, has introduced the TrueClr catheter product line, designed to help eliminate catheter-associated urinary tract infections (CAUTIs) in hospitals, enhance patient comfort and quality of life, and reduce overall healthcare costs. This innovative offering provides physicians, nurses, and patients with a safer and more effective alternative to traditional catheter systems.

As a result, these innovations not only enhance the user experience but also contribute to safer and more effective solutions, making them increasingly attractive to both healthcare providers and patients.

Restraint:

Leakage issues in external catheters are hampering the growth of the external catheter market

Leakage remains one of the most common and frustrating issues associated with external catheters, and it's a key factor expected to slow down market growth. When external catheters fail to stay in place properly or don't provide a secure seal, urine leakage can occur. This not only causes discomfort and skin irritation for the user but also creates extra work for caregivers and lowers overall satisfaction with the product.

Many long-term care facilities have reported frequent nighttime leakage in male patients using condom-style catheters, often resulting in the need for bedding changes and even increased risk of skin breakdown.

There was one instance of urine leak (1.8%). Nurses felt that the catheter was better than existing products in 95% of responses. In female patients, early versions of external catheters struggled with fit and positioning, leading to similar leakage concerns.

These kinds of performance issues can cause users and healthcare providers to lose confidence in non-invasive options and revert to indwelling catheters, despite the known risks. Until external catheters can consistently provide a secure, leak-free experience, this challenge is likely to remain a barrier to wider adoption, particularly in home-care and outpatient settings.

Opportunity:

Antimicrobial & reusable external catheters are expected to create a lucrative opportunity for the growth of the external catheter market

The antimicrobial and reusable external catheters present a significant growth opportunity in the external catheter market due to their potential to address key healthcare challenges and evolving market demands. By reducing the risk of catheter-associated urinary tract infections (CAUTIs) through antimicrobial coatings, these products align with the increasing emphasis on infection control and patient safety in hospitals and long-term care settings. Additionally, reusable catheters respond to growing sustainability concerns, offering eco-friendly alternatives to traditional single-use devices and reducing medical waste..

External Catheter Market, Segment Analysis

The global external catheter market is segmented based on type, usability, application, end-user, and region.

The male external catheter segment was valued at US\$ 0.96 Billion in 2024 in the external catheter market

Several key factors are fueling the growth of the male external catheter segment. One of the major drivers is the rising prevalence of urinary incontinence among aging male populations, particularly those with conditions like prostate issues, diabetes, or neurogenic bladder disorders. Additionally, there is a strong shift in hospitals and long-term care facilities toward non-invasive alternatives to reduce catheter-associated urinary tract infections (CAUTIs), making male external catheters a preferred option.

Continued innovation in product design, such as breathable silicone sheaths, moisture-wicking adhesives, and improved sizing options, has enhanced user comfort, wear time, and reliability. For instance, in April 2024, Medline and Consure Medical announced a strategic partnership, under which Medline will serve as the exclusive distributor of the QiVi MEC, a male external urine management device designed to help prevent catheter-associated urinary tract infections (CAUTI) and incontinence-associated dermatitis (IAD). This collaboration highlights Medline's continued commitment to providing innovative, high-quality solutions that enhance patient care and safety across healthcare settings.

These factors are expected to drive the segment's growth, holding the segment in the dominant position in the market.

External Catheter Market, Geographical Analysis

North America is expected to dominate the global external catheter market with a 39.5% share in 2024

North America held a dominant position in the global external catheter market, and this leadership is expected to continue throughout the forecast period. The United States, in particular, is projected to experience substantial growth due to its well-established healthcare infrastructure, high per capita healthcare spending, and growing awareness of non-invasive urinary management solutions.

A significant portion of the population in the region suffers from some form of urinary incontinence, which continues to drive demand for effective, comfortable, and discreet catheter options. For instance, according to the 2024 report by the National Institutes of Health (NIH), an estimated 13 million people in the United States are directly affected by urinary incontinence. The condition is particularly prevalent among older adults, with rates exceeding 50% among residents of nursing facilities and rising to over 75% among those in long-term care for more than 100 days. Additionally, caregivers report that approximately 53% of homebound elderly individuals experience some form of incontinence.

Among hospitalized older adults, a random sample revealed that 11% had persistent urinary incontinence upon admission, which increased to 23% by the time of discharge. These statistics underscore the significant and growing burden of incontinence in aging populations and highlight the critical need for effective, non-invasive urinary management solutions such as external catheters.

Asia-Pacific is growing at the fastest pace in the external catheter market, holding 21.7% of the market share

Asia-Pacific is witnessing the fastest growth in the External Catheter market, driven by increasing awareness of rare genetic conditions, enhanced diagnostic capabilities, and expanding access to specialized treatments. Countries across the region are strengthening their healthcare frameworks, with growing support for rare disease identification and management. Improved availability of genetic testing, particularly in

urban centers, is helping clinicians accurately diagnose HAE.

External Catheter Market Competitive Landscape

Top companies in the External Catheter market include B. Braun Melsungen AG, BD, Hollister Incorporated, Coloplast Ltd., Teleflex Incorporated, Medline Industries, LP, Medtronic, AdaptHealth, LLC., Romsons Prime Pvt. Ltd., Ribbel International Limited, among others.

External Catheter Market Key Developments

In June 2025, BioCryst Pharmaceuticals, Inc. announced that Colombia's National Institute of Drug and Food Surveillance (INVIMA) has approved ORLADEYO (berotralstat), an oral, once-daily treatment, for the prevention of External Catheter attacks in both adults and pediatric patients aged 12 years and older.

The global external catheter market report delivers a detailed analysis with 70+ key tables, more than 60+ visually impactful figures, and 178 pages of expert insights, providing a complete view of the market landscape.

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