

U.S. Female External Catheter Market Size, Share & Trends Analysis Report By Material (Silicone, Latex), By Application (Diabetes, Strokes), By Area Of Incontinence, By End-use, By Region, And Segment Forecasts, 2024 - 2030

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Abstracts

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Market Size & Trends

The U.S. female external catheter market size was valued at USD 347.93 million in 2023 and is projected to grow at a CAGR of 5.26% from 2024 to 2030. The market is driven by the increasing demand for innovative and effective solutions for managing urinary incontinence and catheterization in women. Female external catheters are designed to provide a safe, comfortable, and hygienic alternative to traditional indwelling urethral catheters, which can be associated with complications such as urinary tract infections and bladder damage. Trends that are shaping the U.S. market include the growing demand for female external catheters that prioritize comfort, hygiene, and ease of use. The rise of customizable and smart external catheters reflects a growing emphasis on personalized medicine and patient-centered care, and the integration of telemedicine and remote monitoring technologies is becoming increasingly important in the management of urinary incontinence and catheterization.

Prevalence of chronic diseases, such as diabetes, Alzheimer's, Parkinson's, and various other conditions, is significantly increasing, leading to a considerable rise in hospital admission rates, thus driving the growth of the U.S. market for female external catheter. According to the National Diabetes Statistics Report, in 2021, more than 41

million people of all ages (12.5% of the U.S. population) had diabetes, but approximately 9.4 million adults (23.5% of adults with diabetes) were unaware that they had the condition. Notably, the prevalence of diabetes among adults aged 65 years or older increased to an alarming 30.4%. According to the America's Health Rankings report by the United Health Foundation, approximately 29.3 million adults, equivalent to 11.2% of the overall population, reported having three or more chronic health conditions in 2022. Thus, due to the increasing prevalence of chronic diseases and the subsequent surge in hospitalizations, the demand for female external catheter is expected to grow, fueling growth in the U.S. market. Further, the CDC Behavioral Risk Factor Surveillance System, in 2022 reported that West Virginia (41%), Louisiana (40.1%), Oklahoma (40.0%), and Mississippi (39.5%) had the highest rates of adult obesity in the same year. This makes the current increase in the obese population a significant factor contributing to the growth of the Female External Catheter market in this region.

Market Characteristics & Concentration

The market growth stage is medium, and pace of the market growth is accelerating. The U.S. market for female external catheter is characterized by increasing cases of chronic diseases, growing prevalence of urinary incontinence among women coupled with growing demand for discreet and convenient urinary management solutions for women.

Key strategies implemented by players and government entities in the U.S. market for female external catheter are product launch, expanding distribution channels, partnerships, collaboration, marketing & awareness campaigns, and other strategies.

The U.S. market has witnessed a moderate to high degree of innovation in recent years. The market has seen the introduction of new products with advanced features, improved designs, and enhanced materials, which have significantly impacted the industry. One of the key drivers of innovation is the increasing demand for discreet and comfortable products that cater to the specific needs of women with urinary incontinence. As a result, manufacturers have developed products with ergonomic designs, soft and breathable materials, and advanced drainage systems.

The market is regulated by the Food and Drug Administration (FDA), which oversees the safety and effectiveness of medical devices, including catheters. The FDA's regulatory framework provides a framework for the development, testing, and approval of new products. Female external catheters are classified as Class I or II devices, depending on their level of risk. Class I devices are considered low-risk and are subject

minimal regulation, while Class II devices are considered moderate-risk and are subject to more stringent regulations.

Regulations often set standards for safety and efficacy, driving manufacturers to invest in R&D to meet these requirements. Companies prioritize the development of innovative features and advancements in existing technologies not only to meet regulatory requirements but also to ultimately enhance patient outcomes and improve healthcare quality. Compliance with these regulations is mandatory, which can increase the cost and time required for product development and market entry. Additionally, Medicare and Medicaid policies influence the procurement strategies of hospitals, especially with regards to reimbursement rates and coverage for advanced medical equipment.

Market players are focusing on expanding their product portfolios to cater to a broader range of patient needs. The use of advanced materials, such as nanomaterials and biodegradable materials, is expected to increase in the development of new products. These materials offer improved properties, such as enhanced lubricity, antimicrobial activity, and biocompatibility. Further, private labeling opportunities are increasing as manufacturers partner with distributors to create customized products for specific retailers or patients. This trend is driven by the growing demand for personalized healthcare and the need for tailored products that meet specific patient needs. In addition, new entrants are expected to enter the market, particularly in the areas of innovative materials and digital health integration. Established players will need to adapt to these changes to maintain market share and remain competitive.

Companies focus on addressing several patient demographics or meeting specific therapeutic requirements. The market includes large, established companies such as Stryker, BD, Boehringer Laboratories, LLC., Hollister Incorporated, and Consure Medical which offer a broad range of products and have significant market shares. Due to an emphasis of companies in developing customized solutions for certain specializations in the market, this specialization contributes to market fragmentation.

Forming strategic partnerships or collaborations with local distributors, healthcare providers, and key opinion leaders can facilitate market entry and accelerate adoption. Collaborating with established entities can provide valuable insights into regional market nuances, regulatory requirements, and customer preferences.

U.S. Female External Catheter Market Report Segmentation

This report forecasts revenue growth at the country level and provides an analysis of the latest industry trends in each of the sub-segments from 2018 to 2030. For this study, Grand View Research has segmented the U.S. female external catheter market report based on material, application, area of incontinence, end-use, and region

Material Outlook (Revenue, USD Million, 2018 - 2030)

Silicone

Latex

Application Outlook (Revenue, USD Million, 2018 - 2030)

Diabetes

Strokes

Alzheimer's disease

Parkinson's disease

Spinal Cord Injury

Bladder Cancer

Ovarian Cancer

Multiple Sclerosis

Others

Area of Incontinence Outlook (Revenue, USD Million, 2018 - 2030)

Stress Urinary Incontinence

Urge/OAB (Overactive Bladder)

Overflow

Functional

Mixed

Reflex

Severe Incontinence

End-use Outlook (Revenue, USD Million, 2018 - 2030)

Home Care

Hospitals

Other End-use

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