

Global Urine Collection Cup Market Growth 2026-2032

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Abstracts

The global Urine Collection Cup market size is predicted to grow from US\$ 407 million in 2025 to US\$ 562 million in 2032; it is expected to grow at a CAGR of 4.7% from 2026 to 2032.

A urine collection cup is a single-use clinical specimen container designed to receive, temporarily hold, identify and transport a urine sample before urinalysis, microbiology, toxicology or other laboratory testing. It is normally injection-moulded from medical-grade polypropylene or polystyrene and supplied in common capacities of 30–120 mL, while 150–240 mL formats are used for higher-volume or specialised collection. Typical features include a wide opening, moulded graduations, an identification area and a leak-resistant screw or snap closure. Products may be sterile or non-sterile, individually wrapped or bulk-packed, and may incorporate a tamper-evident seal, temperature strip or integrated device that transfers urine into an evacuated tube without reopening the cup. Its essential function is to limit leakage, contamination, aerosols and direct specimen contact while maintaining sample integrity.

Key Findings

Industry gross margin is approximately 15%–30%

Sterile polypropylene screw-cap cups dominate market value

BD remains in the global leading tier

Clinical Urinalysis represent the largest downstream market

Market Trends

Urine collection cups are evolving from low-cost disposable containers toward sterile, leak-resistant, closed-collection and automated-transfer products. Mainstream products generally use transparent medical-grade polypropylene, with capacities primarily ranging from 60 to 120 mL, and commonly feature wide-mouth openings, graduations, patient identification labels and screw closures. As hospitals place greater emphasis on biosafety and specimen integrity, closed cups with integrated transfer devices are gaining importance in premium applications because they reduce lid opening, manual pouring and direct specimen contact. Future products are expected to further strengthen barcode identification, compatibility with automated sample handling, error-prevention designs and environmentally optimized material use, gradually transforming urine collection cups from simple consumables into standardized components of the pre-analytical laboratory workflow.

Market Dynamics

Drivers

Market demand is mainly supported by routine urinalysis, urine culture, pregnancy testing, chronic disease screening and health examination services. Urine collection cups are basic, high-frequency disposable consumables in clinical diagnostics, while hospitals, independent laboratories and health screening centers increasingly require stronger contamination control, safer transportation and more convenient handling. Sterile products reduce the risk of microbial contamination, screw closures help minimize leakage during transport, and transparent graduated containers make specimen observation and volume control easier. As clinical laboratories become more automated, demand is increasing for closed collection products that can directly connect with evacuated tubes or transfer devices. This trend is shifting product value from basic plastic containers toward integrated and safer specimen collection systems.

Restraints

Compared with many higher-value medical consumables, conventional urine collection cups have relatively low technical barriers and significant product standardization, resulting in strong price competition. Changes in polypropylene resin prices, sterilization expenses, clean manufacturing costs and logistics directly affect manufacturer profitability, while centralized hospital procurement places additional pressure on standard-product pricing. Non-sterile basic cups can still satisfy some routine urinalysis requirements, limiting the replacement potential of higher-specification products in every application. Closed-system cups with transfer devices require more complex structures,

higher molding precision and stricter quality control, and they must also match collection tubes and laboratory workflows. As a result, customer qualification and product introduction cycles for these systems are generally longer than those for conventional urine cups.

Opportunities

The most attractive opportunities are concentrated in sterile closed collection cups, integrated transfer devices, urine-culture collection systems and products compatible with automated laboratories. Products with capacities of around 120 mL, wide-mouth openings, screw closures and built-in transfer interfaces can reduce direct pouring by healthcare workers, improve specimen safety and lower cross-contamination risk. As large hospitals and independent laboratories automate pre-analytical workflows, integration between urine collection cups, evacuated tubes, preservative tubes and barcode tracking systems is expected to increase. Home testing, telemedicine and chronic disease management also create new opportunities for individually packaged urine collection kits that are easy for patients to use and suitable for safe specimen transportation.

Challenges

Major industry challenges include product standardization, low-price competition, rising biosafety requirements and differences in medical-device regulations across regions. Although urine collection cups have relatively simple structures, sealing performance, material cleanliness, sterility, graduation accuracy and transportation stability directly influence specimen quality. Premium healthcare institutions also require consistent manufacturing quality and reliable traceability. For closed-system products, poorly designed transfer interfaces can increase the risk of leakage, handling failure or sharps-related safety issues, making structural reliability particularly important. Disposable plastic medical consumables also face increasing environmental pressure, requiring manufacturers to balance material reduction and recyclability with clinical safety requirements. Global suppliers must additionally comply with different registration, quality-system and hospital procurement standards, increasing the complexity of international operations.

Industry Chain Analysis

The upstream supply chain mainly includes medical-grade polypropylene, high-density polyethylene and other plastic resins, together with colorants, labels, packaging materials, sterilization services and injection molds. Material purity and consistency

directly influence container transparency, sealing performance and biological compatibility. Midstream production generally includes injection molding, cap manufacturing, graduation printing, labeling, assembly, leakage testing, clean packaging and sterilization. Premium products may additionally integrate needle-free transfer interfaces or connections for evacuated collection tubes. Downstream customers include hospital laboratories, independent diagnostic laboratories, clinics, health screening centers and home-testing users, with applications in urinalysis, urine culture, pregnancy testing and disease screening. Industry-chain value is moving from conventional open cups toward sterile, leak-resistant, closed-transfer systems and complete specimen collection kits.

Segment Insights

Sterile screw-cap urine collection cups currently represent the most important value segment. Mainstream capacities range from approximately 60 to 120 mL, with 100–120 mL products widely used. Wide-mouth openings improve collection convenience, while transparent polypropylene bodies, graduations, identification labels and leak-resistant screw caps are common features. BD offers urine collection cups with a typical capacity of 120 mL and integrated transfer devices; Thermo Fisher Scientific supplies 90 mL and 120 mL midstream urine collection products; and SARSTEDT offers representative 100 mL urine cups. Sterility, reliable sealing and ease of handling are key competitive parameters within this segment.

Closed urine collection cups with integrated transfer devices represent one of the fastest-developing technology directions. These products incorporate a transfer structure within the lid, allowing urine specimens to move directly into evacuated or preservative tubes without manually opening and pouring the sample. This design reduces contamination, leakage and operator exposure. Newer systems increasingly emphasize needle-free transfer, patient identification, compatibility with preservative tubes and integration with automated laboratory workflows. Compared with conventional open cups, these products carry higher unit value and are particularly suitable for large hospitals, urine culture and centralized testing environments. Future products may further incorporate barcode or two-dimensional-code tracking and compatibility with automated sorting systems.

Downstream Market Opportunities

Clinical Urinalysis represent the most important downstream market for urine collection cups, with major applications including routine urinalysis, urine culture, drug screening,

pregnancy testing and kidney or metabolic disease testing. Customer requirements are shifting from low-cost disposable containers toward sterile, leak-resistant products that are easy to identify and compatible with automated systems. Artificial intelligence does not directly increase the functional value of the cup itself, but AI-assisted urinalysis, digital microscopy and automated laboratory systems increase the need for standardized specimens. This supports demand for barcode tracking, closed transfer and automated sorting compatibility. Home diagnostics and telemedicine also provide potential opportunities, particularly for individually packaged collection kits with clear instructions and safe specimen-transport capabilities.

Regional Insights

North America is an important market for higher-specification urine collection cups, where hospitals and independent laboratories place strong emphasis on sterility, leak resistance, closed transfer and specimen traceability. BD and Thermo Fisher Scientific maintain established product portfolios in this region. Europe places significant importance on medical-device quality management, biosafety and laboratory standardization, with SARSTEDT maintaining a strong position in urine collection and pre-analytical products. Asia-Pacific has a large hospital, diagnostic and health-screening base, while China, Japan, South Korea and India generate substantial demand for urine testing consumables. Regional manufacturers also compete through injection-molding capabilities and cost advantages. Overall, North America and Europe show stronger demand for higher-value closed systems, while Asia supports both standard urine cups and premium products compatible with automated laboratories.

Competitive Landscape Analysis

The global urine collection cup market is relatively fragmented, although stronger brand and technology barriers exist in premium clinical collection and closed-transfer systems. Leading participants include BD, Thermo Fisher Scientific and SARSTEDT. BD offers urine collection cups and complete kits incorporating integrated transfer devices and benefits from its broader evacuated specimen-collection platform. Thermo Fisher Scientific provides multiple sterile and non-sterile specimen containers in the 90–120 mL range, including products designed for midstream urine collection. SARSTEDT supplies 100 mL urine cups, sterile screw-cap containers and needle-free transfer products. Future competition will increasingly focus on sealing reliability, laboratory automation compatibility, specimen traceability, completeness of product portfolios and global healthcare distribution capabilities.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Urine Collection Cup Industry Forecast” looks at past sales and reviews total world Urine Collection Cup sales in 2025, providing a comprehensive analysis by region and market sector of projected Urine Collection Cup sales for 2026 through 2032. With Urine Collection Cup sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Urine Collection Cup industry.

This Insight Report provides a comprehensive analysis of the global Urine Collection Cup landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Urine Collection Cup portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Urine Collection Cup market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Urine Collection Cup and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Urine Collection Cup.

This report presents a comprehensive overview, market shares, and growth opportunities of Urine Collection Cup market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Sterile

Non-sterile

Segmentation by Sizes:

Sizes: 60ml

Sizes: 120ml

Others

Segmentation by Material:

Polypropylene

Polystyrene

Others

Segmentation by Application:

Clinical Urinalysis

Laboratory Urinalysis

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered

from primary experts and analysing the company's coverage, product portfolio, its market penetration.

BD

Thermo Fisher Scientific

Greiner Bio-One

SARSTEDT

Globe Scientific

Cardinal Health

Medline Industries

Labcon

Dynarex Corporation

Medegen Medical Products

Simport Scientific

Deltalab

FL Medical

Aptaca

Biosigma

Kartell LABWARE

LP Italiana

Jiangsu Kehua

Shandong Chengwu Medical Products Factory

Sunmed

Tedamed

Changfeng Medical

Jiangsu Fu Shi Kang Medical

KAHOTEST

Kang Jian Medical

YULI Medical

Nissho Sangyo

Toyo Kizai Kagaku

SUNNAP

Key Questions Addressed in this Report

What is the 10-year outlook for the global Urine Collection Cup market?

What factors are driving Urine Collection Cup market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Urine Collection Cup market opportunities vary by end market size?

How does Urine Collection Cup break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Urine Collection Cup Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Urine Collection Cup by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Urine Collection Cup by Country/Region, 2021, 2025 & 2032
- 2.2 Urine Collection Cup Segment by Type
 - 2.2.1 Sterile
 - 2.2.2 Non-sterile
 - 2.2.3 Urine Collection Cup Sales by Type
 - 2.2.3.1 Global Urine Collection Cup Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global Urine Collection Cup Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global Urine Collection Cup Sale Price by Type (2021-2026)
- 2.3 Urine Collection Cup Segment by Sizes
 - 2.3.1 Sizes: 60ml
 - 2.3.2 Sizes: 120ml
 - 2.3.3 Others
 - 2.3.4 Urine Collection Cup Sales by Sizes
 - 2.3.4.1 Global Urine Collection Cup Sales Market Share by Sizes (2021-2026)
 - 2.3.4.2 Global Urine Collection Cup Revenue and Market Share by Sizes (2021-2026)
 - 2.3.4.3 Global Urine Collection Cup Sale Price by Sizes (2021-2026)
- 2.4 Urine Collection Cup Segment by Material
 - 2.4.1 Polypropylene

2.4.2 Polystyrene

2.4.3 Others

2.4.4 Urine Collection Cup Sales by Material

2.4.4.1 Global Urine Collection Cup Sales Market Share by Material (2021-2026)

2.4.4.2 Global Urine Collection Cup Revenue and Market Share by Material
(2021-2026)

2.4.4.3 Global Urine Collection Cup Sale Price by Material (2021-2026)

2.5 Urine Collection Cup Segment by Application

2.5.1 Clinical Urinalysis

2.5.2 Laboratory Urinalysis

2.5.3 Other

2.5.4 Urine Collection Cup Sales by Application

2.5.4.1 Global Urine Collection Cup Sale Market Share by Application (2021-2026)

2.5.4.2 Global Urine Collection Cup Revenue and Market Share by Application
(2021-2026)

2.5.4.3 Global Urine Collection Cup Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Urine Collection Cup Breakdown Data by Company

3.1.1 Global Urine Collection Cup Annual Sales by Company (2021-2026)

3.1.2 Global Urine Collection Cup Sales Market Share by Company (2021-2026)

3.2 Global Urine Collection Cup Annual Revenue by Company (2021-2026)

3.2.1 Global Urine Collection Cup Revenue by Company (2021-2026)

3.2.2 Global Urine Collection Cup Revenue Market Share by Company (2021-2026)

3.3 Global Urine Collection Cup Sale Price by Company

3.4 Key Manufacturers Urine Collection Cup Producing Area Distribution, Sales Area,
Product Type

3.4.1 Key Manufacturers Urine Collection Cup Product Location Distribution

3.4.2 Players Urine Collection Cup Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR URINE COLLECTION CUP BY GEOGRAPHIC REGION

- 4.1 World Historic Urine Collection Cup Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Urine Collection Cup Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Urine Collection Cup Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Urine Collection Cup Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Urine Collection Cup Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Urine Collection Cup Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Urine Collection Cup Sales Growth
- 4.4 APAC Urine Collection Cup Sales Growth
- 4.5 Europe Urine Collection Cup Sales Growth
- 4.6 Middle East & Africa Urine Collection Cup Sales Growth

5 AMERICAS

- 5.1 Americas Urine Collection Cup Sales by Country
 - 5.1.1 Americas Urine Collection Cup Sales by Country (2021-2026)
 - 5.1.2 Americas Urine Collection Cup Revenue by Country (2021-2026)
- 5.2 Americas Urine Collection Cup Sales by Type (2021-2026)
- 5.3 Americas Urine Collection Cup Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Urine Collection Cup Sales by Region
 - 6.1.1 APAC Urine Collection Cup Sales by Region (2021-2026)
 - 6.1.2 APAC Urine Collection Cup Revenue by Region (2021-2026)
- 6.2 APAC Urine Collection Cup Sales by Type (2021-2026)
- 6.3 APAC Urine Collection Cup Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

7.1 Europe Urine Collection Cup by Country

7.1.1 Europe Urine Collection Cup Sales by Country (2021-2026)

7.1.2 Europe Urine Collection Cup Revenue by Country (2021-2026)

7.2 Europe Urine Collection Cup Sales by Type (2021-2026)

7.3 Europe Urine Collection Cup Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Urine Collection Cup by Country

8.1.1 Middle East & Africa Urine Collection Cup Sales by Country (2021-2026)

8.1.2 Middle East & Africa Urine Collection Cup Revenue by Country (2021-2026)

8.2 Middle East & Africa Urine Collection Cup Sales by Type (2021-2026)

8.3 Middle East & Africa Urine Collection Cup Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Urine Collection Cup

10.3 Manufacturing Process Analysis of Urine Collection Cup

10.4 Industry Chain Structure of Urine Collection Cup

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Urine Collection Cup Distributors

11.3 Urine Collection Cup Customer

12 WORLD FORECAST REVIEW FOR URINE COLLECTION CUP BY GEOGRAPHIC REGION

12.1 Global Urine Collection Cup Market Size Forecast by Region

12.1.1 Global Urine Collection Cup Forecast by Region (2027-2032)

12.1.2 Global Urine Collection Cup Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Urine Collection Cup Forecast by Type (2027-2032)

12.7 Global Urine Collection Cup Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 BD

13.1.1 BD Company Information

13.1.2 BD Urine Collection Cup Product Portfolios and Specifications

13.1.3 BD Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 BD Main Business Overview

13.1.5 BD Latest Developments

13.2 Thermo Fisher Scientific

13.2.1 Thermo Fisher Scientific Company Information

13.2.2 Thermo Fisher Scientific Urine Collection Cup Product Portfolios and Specifications

13.2.3 Thermo Fisher Scientific Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Thermo Fisher Scientific Main Business Overview

13.2.5 Thermo Fisher Scientific Latest Developments

13.3 Greiner Bio-One

13.3.1 Greiner Bio-One Company Information

- 13.3.2 Greiner Bio-One Urine Collection Cup Product Portfolios and Specifications
- 13.3.3 Greiner Bio-One Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 Greiner Bio-One Main Business Overview
- 13.3.5 Greiner Bio-One Latest Developments
- 13.4 SARSTEDT
 - 13.4.1 SARSTEDT Company Information
 - 13.4.2 SARSTEDT Urine Collection Cup Product Portfolios and Specifications
 - 13.4.3 SARSTEDT Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 SARSTEDT Main Business Overview
 - 13.4.5 SARSTEDT Latest Developments
- 13.5 Globe Scientific
 - 13.5.1 Globe Scientific Company Information
 - 13.5.2 Globe Scientific Urine Collection Cup Product Portfolios and Specifications
 - 13.5.3 Globe Scientific Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Globe Scientific Main Business Overview
 - 13.5.5 Globe Scientific Latest Developments
- 13.6 Cardinal Health
 - 13.6.1 Cardinal Health Company Information
 - 13.6.2 Cardinal Health Urine Collection Cup Product Portfolios and Specifications
 - 13.6.3 Cardinal Health Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Cardinal Health Main Business Overview
 - 13.6.5 Cardinal Health Latest Developments
- 13.7 Medline Industries
 - 13.7.1 Medline Industries Company Information
 - 13.7.2 Medline Industries Urine Collection Cup Product Portfolios and Specifications
 - 13.7.3 Medline Industries Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Medline Industries Main Business Overview
 - 13.7.5 Medline Industries Latest Developments
- 13.8 Labcon
 - 13.8.1 Labcon Company Information
 - 13.8.2 Labcon Urine Collection Cup Product Portfolios and Specifications
 - 13.8.3 Labcon Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Labcon Main Business Overview

- 13.8.5 Labcon Latest Developments
- 13.9 Dynarex Corporation
 - 13.9.1 Dynarex Corporation Company Information
 - 13.9.2 Dynarex Corporation Urine Collection Cup Product Portfolios and Specifications
 - 13.9.3 Dynarex Corporation Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Dynarex Corporation Main Business Overview
 - 13.9.5 Dynarex Corporation Latest Developments
- 13.10 Medegen Medical Products
 - 13.10.1 Medegen Medical Products Company Information
 - 13.10.2 Medegen Medical Products Urine Collection Cup Product Portfolios and Specifications
 - 13.10.3 Medegen Medical Products Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Medegen Medical Products Main Business Overview
 - 13.10.5 Medegen Medical Products Latest Developments
- 13.11 Simport Scientific
 - 13.11.1 Simport Scientific Company Information
 - 13.11.2 Simport Scientific Urine Collection Cup Product Portfolios and Specifications
 - 13.11.3 Simport Scientific Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Simport Scientific Main Business Overview
 - 13.11.5 Simport Scientific Latest Developments
- 13.12 Deltalab
 - 13.12.1 Deltalab Company Information
 - 13.12.2 Deltalab Urine Collection Cup Product Portfolios and Specifications
 - 13.12.3 Deltalab Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Deltalab Main Business Overview
 - 13.12.5 Deltalab Latest Developments
- 13.13 FL Medical
 - 13.13.1 FL Medical Company Information
 - 13.13.2 FL Medical Urine Collection Cup Product Portfolios and Specifications
 - 13.13.3 FL Medical Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 FL Medical Main Business Overview
 - 13.13.5 FL Medical Latest Developments
- 13.14 Aptaca
 - 13.14.1 Aptaca Company Information

- 13.14.2 Aptaca Urine Collection Cup Product Portfolios and Specifications
- 13.14.3 Aptaca Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.14.4 Aptaca Main Business Overview
- 13.14.5 Aptaca Latest Developments
- 13.15 Biosigma
 - 13.15.1 Biosigma Company Information
 - 13.15.2 Biosigma Urine Collection Cup Product Portfolios and Specifications
 - 13.15.3 Biosigma Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.15.4 Biosigma Main Business Overview
 - 13.15.5 Biosigma Latest Developments
- 13.16 Kartell LABWARE
 - 13.16.1 Kartell LABWARE Company Information
 - 13.16.2 Kartell LABWARE Urine Collection Cup Product Portfolios and Specifications
 - 13.16.3 Kartell LABWARE Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.16.4 Kartell LABWARE Main Business Overview
 - 13.16.5 Kartell LABWARE Latest Developments
- 13.17 LP Italiana
 - 13.17.1 LP Italiana Company Information
 - 13.17.2 LP Italiana Urine Collection Cup Product Portfolios and Specifications
 - 13.17.3 LP Italiana Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.17.4 LP Italiana Main Business Overview
 - 13.17.5 LP Italiana Latest Developments
- 13.18 Jiangsu Kehua
 - 13.18.1 Jiangsu Kehua Company Information
 - 13.18.2 Jiangsu Kehua Urine Collection Cup Product Portfolios and Specifications
 - 13.18.3 Jiangsu Kehua Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 Jiangsu Kehua Main Business Overview
 - 13.18.5 Jiangsu Kehua Latest Developments
- 13.19 Shandong Chengwu Medical Products Factory
 - 13.19.1 Shandong Chengwu Medical Products Factory Company Information
 - 13.19.2 Shandong Chengwu Medical Products Factory Urine Collection Cup Product Portfolios and Specifications
 - 13.19.3 Shandong Chengwu Medical Products Factory Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.19.4 Shandong Chengwu Medical Products Factory Main Business Overview
- 13.19.5 Shandong Chengwu Medical Products Factory Latest Developments
- 13.20 Sunmed
 - 13.20.1 Sunmed Company Information
 - 13.20.2 Sunmed Urine Collection Cup Product Portfolios and Specifications
 - 13.20.3 Sunmed Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 Sunmed Main Business Overview
 - 13.20.5 Sunmed Latest Developments
- 13.21 Tedamed
 - 13.21.1 Tedamed Company Information
 - 13.21.2 Tedamed Urine Collection Cup Product Portfolios and Specifications
 - 13.21.3 Tedamed Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.21.4 Tedamed Main Business Overview
 - 13.21.5 Tedamed Latest Developments
- 13.22 Changfeng Medical
 - 13.22.1 Changfeng Medical Company Information
 - 13.22.2 Changfeng Medical Urine Collection Cup Product Portfolios and Specifications
 - 13.22.3 Changfeng Medical Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.22.4 Changfeng Medical Main Business Overview
 - 13.22.5 Changfeng Medical Latest Developments
- 13.23 Jiangsu Fu Shi Kang Medical
 - 13.23.1 Jiangsu Fu Shi Kang Medical Company Information
 - 13.23.2 Jiangsu Fu Shi Kang Medical Urine Collection Cup Product Portfolios and Specifications
 - 13.23.3 Jiangsu Fu Shi Kang Medical Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.23.4 Jiangsu Fu Shi Kang Medical Main Business Overview
 - 13.23.5 Jiangsu Fu Shi Kang Medical Latest Developments
- 13.24 KAHOTEST
 - 13.24.1 KAHOTEST Company Information
 - 13.24.2 KAHOTEST Urine Collection Cup Product Portfolios and Specifications
 - 13.24.3 KAHOTEST Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.24.4 KAHOTEST Main Business Overview
 - 13.24.5 KAHOTEST Latest Developments
- 13.25 Kang Jian Medical

- 13.25.1 Kang Jian Medical Company Information
- 13.25.2 Kang Jian Medical Urine Collection Cup Product Portfolios and Specifications
- 13.25.3 Kang Jian Medical Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.25.4 Kang Jian Medical Main Business Overview
- 13.25.5 Kang Jian Medical Latest Developments
- 13.26 YULI Medical
 - 13.26.1 YULI Medical Company Information
 - 13.26.2 YULI Medical Urine Collection Cup Product Portfolios and Specifications
 - 13.26.3 YULI Medical Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.26.4 YULI Medical Main Business Overview
 - 13.26.5 YULI Medical Latest Developments
- 13.27 Nissho Sangyo
 - 13.27.1 Nissho Sangyo Company Information
 - 13.27.2 Nissho Sangyo Urine Collection Cup Product Portfolios and Specifications
 - 13.27.3 Nissho Sangyo Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.27.4 Nissho Sangyo Main Business Overview
 - 13.27.5 Nissho Sangyo Latest Developments
- 13.28 Toyo Kizai Kagaku
 - 13.28.1 Toyo Kizai Kagaku Company Information
 - 13.28.2 Toyo Kizai Kagaku Urine Collection Cup Product Portfolios and Specifications
 - 13.28.3 Toyo Kizai Kagaku Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.28.4 Toyo Kizai Kagaku Main Business Overview
 - 13.28.5 Toyo Kizai Kagaku Latest Developments
- 13.29 SUNNAP
 - 13.29.1 SUNNAP Company Information
 - 13.29.2 SUNNAP Urine Collection Cup Product Portfolios and Specifications
 - 13.29.3 SUNNAP Urine Collection Cup Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.29.4 SUNNAP Main Business Overview
 - 13.29.5 SUNNAP Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Urine Collection Cup Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Urine Collection Cup Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Sterile
- Table 4. Major Players of Non-sterile
- Table 5. Global Urine Collection Cup Sales by Type (2021-2026) & (K Units)
- Table 6. Global Urine Collection Cup Sales Market Share by Type (2021-2026)
- Table 7. Global Urine Collection Cup Revenue by Type (2021-2026) & (\$ million)
- Table 8. Global Urine Collection Cup Revenue Market Share by Type (2021-2026)
- Table 9. Global Urine Collection Cup Sale Price by Type (2021-2026) & (US\$/Unit)
- Table 10. Major Players of Sizes: 60ml
- Table 11. Major Players of Sizes: 120ml
- Table 12. Major Players of Others
- Table 13. Global Urine Collection Cup Sales by Sizes (2021-2026) & (K Units)
- Table 14. Global Urine Collection Cup Sales Market Share by Sizes (2021-2026)
- Table 15. Global Urine Collection Cup Revenue by Sizes (2021-2026) & (\$ million)
- Table 16. Global Urine Collection Cup Revenue Market Share by Sizes (2021-2026)
- Table 17. Global Urine Collection Cup Sale Price by Sizes (2021-2026) & (US\$/Unit)
- Table 18. Major Players of Polypropylene
- Table 19. Major Players of Polystyrene
- Table 20. Major Players of Others
- Table 21. Global Urine Collection Cup Sales by Material (2021-2026) & (K Units)
- Table 22. Global Urine Collection Cup Sales Market Share by Material (2021-2026)
- Table 23. Global Urine Collection Cup Revenue by Material (2021-2026) & (\$ million)
- Table 24. Global Urine Collection Cup Revenue Market Share by Material (2021-2026)
- Table 25. Global Urine Collection Cup Sale Price by Material (2021-2026) & (US\$/Unit)
- Table 26. Global Urine Collection Cup Sale by Application (2021-2026) & (K Units)
- Table 27. Global Urine Collection Cup Sale Market Share by Application (2021-2026)
- Table 28. Global Urine Collection Cup Revenue by Application (2021-2026) & (\$ million)
- Table 29. Global Urine Collection Cup Revenue Market Share by Application (2021-2026)
- Table 30. Global Urine Collection Cup Sale Price by Application (2021-2026) & (US\$/Unit)
- Table 31. Global Urine Collection Cup Sales by Company (2021-2026) & (K Units)

Table 32. Global Urine Collection Cup Sales Market Share by Company (2021-2026)
Table 33. Global Urine Collection Cup Revenue by Company (2021-2026) & (\$ millions)
Table 34. Global Urine Collection Cup Revenue Market Share by Company (2021-2026)
Table 35. Global Urine Collection Cup Sale Price by Company (2021-2026) & (US\$/Unit)
Table 36. Key Manufacturers Urine Collection Cup Producing Area Distribution and Sales Area
Table 37. Players Urine Collection Cup Products Offered
Table 38. Urine Collection Cup Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 39. New Products and Potential Entrants
Table 40. Market M&A Activity & Strategy
Table 41. Global Urine Collection Cup Sales by Geographic Region (2021-2026) & (K Units)
Table 42. Global Urine Collection Cup Sales Market Share Geographic Region (2021-2026)
Table 43. Global Urine Collection Cup Revenue by Geographic Region (2021-2026) & (\$ millions)
Table 44. Global Urine Collection Cup Revenue Market Share by Geographic Region (2021-2026)
Table 45. Global Urine Collection Cup Sales by Country/Region (2021-2026) & (K Units)
Table 46. Global Urine Collection Cup Sales Market Share by Country/Region (2021-2026)
Table 47. Global Urine Collection Cup Revenue by Country/Region (2021-2026) & (\$ millions)
Table 48. Global Urine Collection Cup Revenue Market Share by Country/Region (2021-2026)
Table 49. Americas Urine Collection Cup Sales by Country (2021-2026) & (K Units)
Table 50. Americas Urine Collection Cup Sales Market Share by Country (2021-2026)
Table 51. Americas Urine Collection Cup Revenue by Country (2021-2026) & (\$ millions)
Table 52. Americas Urine Collection Cup Sales by Type (2021-2026) & (K Units)
Table 53. Americas Urine Collection Cup Sales by Application (2021-2026) & (K Units)
Table 54. APAC Urine Collection Cup Sales by Region (2021-2026) & (K Units)
Table 55. APAC Urine Collection Cup Sales Market Share by Region (2021-2026)
Table 56. APAC Urine Collection Cup Revenue by Region (2021-2026) & (\$ millions)
Table 57. APAC Urine Collection Cup Sales by Type (2021-2026) & (K Units)
Table 58. APAC Urine Collection Cup Sales by Application (2021-2026) & (K Units)
Table 59. Europe Urine Collection Cup Sales by Country (2021-2026) & (K Units)

Table 60. Europe Urine Collection Cup Revenue by Country (2021-2026) & (\$ millions)
Table 61. Europe Urine Collection Cup Sales by Type (2021-2026) & (K Units)
Table 62. Europe Urine Collection Cup Sales by Application (2021-2026) & (K Units)
Table 63. Middle East & Africa Urine Collection Cup Sales by Country (2021-2026) & (K Units)
Table 64. Middle East & Africa Urine Collection Cup Revenue Market Share by Country (2021-2026)
Table 65. Middle East & Africa Urine Collection Cup Sales by Type (2021-2026) & (K Units)
Table 66. Middle East & Africa Urine Collection Cup Sales by Application (2021-2026) & (K Units)
Table 67. Key Market Drivers & Growth Opportunities of Urine Collection Cup
Table 68. Key Market Challenges & Risks of Urine Collection Cup
Table 69. Key Industry Trends of Urine Collection Cup
Table 70. Urine Collection Cup Raw Material
Table 71. Key Suppliers of Raw Materials
Table 72. Urine Collection Cup Distributors List
Table 73. Urine Collection Cup Customer List
Table 74. Global Urine Collection Cup Sales Forecast by Region (2027-2032) & (K Units)
Table 75. Global Urine Collection Cup Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 76. Americas Urine Collection Cup Sales Forecast by Country (2027-2032) & (K Units)
Table 77. Americas Urine Collection Cup Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 78. APAC Urine Collection Cup Sales Forecast by Region (2027-2032) & (K Units)
Table 79. APAC Urine Collection Cup Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 80. Europe Urine Collection Cup Sales Forecast by Country (2027-2032) & (K Units)
Table 81. Europe Urine Collection Cup Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 82. Middle East & Africa Urine Collection Cup Sales Forecast by Country (2027-2032) & (K Units)
Table 83. Middle East & Africa Urine Collection Cup Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 84. Global Urine Collection Cup Sales Forecast by Type (2027-2032) & (K Units)

Table 85. Global Urine Collection Cup Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 86. Global Urine Collection Cup Sales Forecast by Application (2027-2032) & (K Units)

Table 87. Global Urine Collection Cup Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 88. BD Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 89. BD Urine Collection Cup Product Portfolios and Specifications

Table 90. BD Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 91. BD Main Business

Table 92. BD Latest Developments

Table 93. Thermo Fisher Scientific Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 94. Thermo Fisher Scientific Urine Collection Cup Product Portfolios and Specifications

Table 95. Thermo Fisher Scientific Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 96. Thermo Fisher Scientific Main Business

Table 97. Thermo Fisher Scientific Latest Developments

Table 98. Greiner Bio-One Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 99. Greiner Bio-One Urine Collection Cup Product Portfolios and Specifications

Table 100. Greiner Bio-One Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 101. Greiner Bio-One Main Business

Table 102. Greiner Bio-One Latest Developments

Table 103. SARSTEDT Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 104. SARSTEDT Urine Collection Cup Product Portfolios and Specifications

Table 105. SARSTEDT Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 106. SARSTEDT Main Business

Table 107. SARSTEDT Latest Developments

Table 108. Globe Scientific Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 109. Globe Scientific Urine Collection Cup Product Portfolios and Specifications

Table 110. Globe Scientific Urine Collection Cup Sales (K Units), Revenue (\$ Million),

Price (US\$/Unit) and Gross Margin (2021-2026)

Table 111. Globe Scientific Main Business

Table 112. Globe Scientific Latest Developments

Table 113. Cardinal Health Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 114. Cardinal Health Urine Collection Cup Product Portfolios and Specifications

Table 115. Cardinal Health Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 116. Cardinal Health Main Business

Table 117. Cardinal Health Latest Developments

Table 118. Medline Industries Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 119. Medline Industries Urine Collection Cup Product Portfolios and Specifications

Table 120. Medline Industries Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 121. Medline Industries Main Business

Table 122. Medline Industries Latest Developments

Table 123. Labcon Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 124. Labcon Urine Collection Cup Product Portfolios and Specifications

Table 125. Labcon Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 126. Labcon Main Business

Table 127. Labcon Latest Developments

Table 128. Dynarex Corporation Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 129. Dynarex Corporation Urine Collection Cup Product Portfolios and Specifications

Table 130. Dynarex Corporation Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 131. Dynarex Corporation Main Business

Table 132. Dynarex Corporation Latest Developments

Table 133. Medegen Medical Products Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 134. Medegen Medical Products Urine Collection Cup Product Portfolios and Specifications

Table 135. Medegen Medical Products Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 136. Medegen Medical Products Main Business
Table 137. Medegen Medical Products Latest Developments
Table 138. Simport Scientific Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors
Table 139. Simport Scientific Urine Collection Cup Product Portfolios and Specifications
Table 140. Simport Scientific Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 141. Simport Scientific Main Business
Table 142. Simport Scientific Latest Developments
Table 143. Deltalab Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors
Table 144. Deltalab Urine Collection Cup Product Portfolios and Specifications
Table 145. Deltalab Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 146. Deltalab Main Business
Table 147. Deltalab Latest Developments
Table 148. FL Medical Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors
Table 149. FL Medical Urine Collection Cup Product Portfolios and Specifications
Table 150. FL Medical Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 151. FL Medical Main Business
Table 152. FL Medical Latest Developments
Table 153. Aptaca Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors
Table 154. Aptaca Urine Collection Cup Product Portfolios and Specifications
Table 155. Aptaca Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 156. Aptaca Main Business
Table 157. Aptaca Latest Developments
Table 158. Biosigma Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors
Table 159. Biosigma Urine Collection Cup Product Portfolios and Specifications
Table 160. Biosigma Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 161. Biosigma Main Business
Table 162. Biosigma Latest Developments
Table 163. Kartell LABWARE Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 164. Kartell LABWARE Urine Collection Cup Product Portfolios and Specifications

Table 165. Kartell LABWARE Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 166. Kartell LABWARE Main Business

Table 167. Kartell LABWARE Latest Developments

Table 168. LP Italiana Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 169. LP Italiana Urine Collection Cup Product Portfolios and Specifications

Table 170. LP Italiana Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 171. LP Italiana Main Business

Table 172. LP Italiana Latest Developments

Table 173. Jiangsu Kehua Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 174. Jiangsu Kehua Urine Collection Cup Product Portfolios and Specifications

Table 175. Jiangsu Kehua Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 176. Jiangsu Kehua Main Business

Table 177. Jiangsu Kehua Latest Developments

Table 178. Shandong Chengwu Medical Products Factory Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 179. Shandong Chengwu Medical Products Factory Urine Collection Cup Product Portfolios and Specifications

Table 180. Shandong Chengwu Medical Products Factory Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 181. Shandong Chengwu Medical Products Factory Main Business

Table 182. Shandong Chengwu Medical Products Factory Latest Developments

Table 183. Sunmed Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 184. Sunmed Urine Collection Cup Product Portfolios and Specifications

Table 185. Sunmed Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 186. Sunmed Main Business

Table 187. Sunmed Latest Developments

Table 188. Tedamed Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 189. Tedamed Urine Collection Cup Product Portfolios and Specifications

Table 190. Tedamed Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price

(US\$/Unit) and Gross Margin (2021-2026)

Table 191. Tedamed Main Business

Table 192. Tedamed Latest Developments

Table 193. Changfeng Medical Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 194. Changfeng Medical Urine Collection Cup Product Portfolios and Specifications

Table 195. Changfeng Medical Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 196. Changfeng Medical Main Business

Table 197. Changfeng Medical Latest Developments

Table 198. Jiangsu Fu Shi Kang Medical Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 199. Jiangsu Fu Shi Kang Medical Urine Collection Cup Product Portfolios and Specifications

Table 200. Jiangsu Fu Shi Kang Medical Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 201. Jiangsu Fu Shi Kang Medical Main Business

Table 202. Jiangsu Fu Shi Kang Medical Latest Developments

Table 203. KAHOTEST Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 204. KAHOTEST Urine Collection Cup Product Portfolios and Specifications

Table 205. KAHOTEST Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 206. KAHOTEST Main Business

Table 207. KAHOTEST Latest Developments

Table 208. Kang Jian Medical Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 209. Kang Jian Medical Urine Collection Cup Product Portfolios and Specifications

Table 210. Kang Jian Medical Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 211. Kang Jian Medical Main Business

Table 212. Kang Jian Medical Latest Developments

Table 213. YULI Medical Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 214. YULI Medical Urine Collection Cup Product Portfolios and Specifications

Table 215. YULI Medical Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 216. YULI Medical Main Business

Table 217. YULI Medical Latest Developments

Table 218. Nissho Sangyo Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 219. Nissho Sangyo Urine Collection Cup Product Portfolios and Specifications

Table 220. Nissho Sangyo Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 221. Nissho Sangyo Main Business

Table 222. Nissho Sangyo Latest Developments

Table 223. Toyo Kizai Kagaku Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 224. Toyo Kizai Kagaku Urine Collection Cup Product Portfolios and Specifications

Table 225. Toyo Kizai Kagaku Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 226. Toyo Kizai Kagaku Main Business

Table 227. Toyo Kizai Kagaku Latest Developments

Table 228. SUNNAP Basic Information, Urine Collection Cup Manufacturing Base, Sales Area and Its Competitors

Table 229. SUNNAP Urine Collection Cup Product Portfolios and Specifications

Table 230. SUNNAP Urine Collection Cup Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 231. SUNNAP Main Business

Table 232. SUNNAP Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Urine Collection Cup

Figure 2. Urine Collection Cup Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Urine Collection Cup Sales Growth Rate 2021-2032 (K Units)

Figure 7. Global Urine Collection Cup Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Urine Collection Cup Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Urine Collection Cup Sales Market Share by Country/Region (2025)

Figure 10. Urine Collection Cup Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Sterile

Figure 12. Product Picture of Non-sterile

Figure 13. Global Urine Collection Cup Sales Market Share by Type in 2026

Figure 14. Global Urine Collection Cup Revenue Market Share by Type (2021-2026)

Figure 15. Product Picture of Sizes: 60ml

Figure 16. Product Picture of Sizes: 120ml

Figure 17. Product Picture of Others

Figure 18. Global Urine Collection Cup Sales Market Share by Sizes in 2026

Figure 19. Global Urine Collection Cup Revenue Market Share by Sizes (2021-2026)

Figure 20. Product Picture of Polypropylene

Figure 21. Product Picture of Polystyrene

Figure 22. Product Picture of Others

Figure 23. Global Urine Collection Cup Sales Market Share by Material in 2026

Figure 24. Global Urine Collection Cup Revenue Market Share by Material (2021-2026)

Figure 25. Urine Collection Cup Consumed in Clinical Urinalysis

Figure 26. Global Urine Collection Cup Market: Clinical Urinalysis (2021-2026) & (K Units)

Figure 27. Urine Collection Cup Consumed in Laboratory Urinalysis

Figure 28. Global Urine Collection Cup Market: Laboratory Urinalysis (2021-2026) & (K Units)

Figure 29. Urine Collection Cup Consumed in Other

Figure 30. Global Urine Collection Cup Market: Other (2021-2026) & (K Units)

Figure 31. Global Urine Collection Cup Sale Market Share by Application (2025)

Figure 32. Global Urine Collection Cup Revenue Market Share by Application in 2025

Figure 33. Urine Collection Cup Sales by Company in 2025 (K Units)

Figure 34. Global Urine Collection Cup Sales Market Share by Company in 2025

Figure 35. Urine Collection Cup Revenue by Company in 2025 (\$ millions)

Figure 36. Global Urine Collection Cup Revenue Market Share by Company in 2025

Figure 37. Global Urine Collection Cup Sales Market Share by Geographic Region (2021-2026)

Figure 38. Global Urine Collection Cup Revenue Market Share by Geographic Region in 2025

Figure 39. Americas Urine Collection Cup Sales 2021-2026 (K Units)

Figure 40. Americas Urine Collection Cup Revenue 2021-2026 (\$ millions)

Figure 41. APAC Urine Collection Cup Sales 2021-2026 (K Units)

Figure 42. APAC Urine Collection Cup Revenue 2021-2026 (\$ millions)

Figure 43. Europe Urine Collection Cup Sales 2021-2026 (K Units)

Figure 44. Europe Urine Collection Cup Revenue 2021-2026 (\$ millions)

Figure 45. Middle East & Africa Urine Collection Cup Sales 2021-2026 (K Units)

Figure 46. Middle East & Africa Urine Collection Cup Revenue 2021-2026 (\$ millions)

Figure 47. Americas Urine Collection Cup Sales Market Share by Country in 2025

Figure 48. Americas Urine Collection Cup Revenue Market Share by Country (2021-2026)

Figure 49. Americas Urine Collection Cup Sales Market Share by Type (2021-2026)

Figure 50. Americas Urine Collection Cup Sales Market Share by Application (2021-2026)

Figure 51. United States Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 52. Canada Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 53. Mexico Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 54. Brazil Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 55. APAC Urine Collection Cup Sales Market Share by Region in 2025

Figure 56. APAC Urine Collection Cup Revenue Market Share by Region (2021-2026)

Figure 57. APAC Urine Collection Cup Sales Market Share by Type (2021-2026)

Figure 58. APAC Urine Collection Cup Sales Market Share by Application (2021-2026)

Figure 59. China Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 60. Japan Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 61. South Korea Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 62. Southeast Asia Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 63. India Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 64. Australia Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 65. China Taiwan Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 66. Europe Urine Collection Cup Sales Market Share by Country in 2025

Figure 67. Europe Urine Collection Cup Revenue Market Share by Country (2021-2026)

Figure 68. Europe Urine Collection Cup Sales Market Share by Type (2021-2026)

Figure 69. Europe Urine Collection Cup Sales Market Share by Application (2021-2026)

Figure 70. Germany Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 71. France Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 72. UK Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 73. Italy Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 74. Russia Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 75. Middle East & Africa Urine Collection Cup Sales Market Share by Country (2021-2026)

Figure 76. Middle East & Africa Urine Collection Cup Sales Market Share by Type (2021-2026)

Figure 77. Middle East & Africa Urine Collection Cup Sales Market Share by Application (2021-2026)

Figure 78. Egypt Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 79. South Africa Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 80. Israel Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 81. Turkey Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 82. GCC Countries Urine Collection Cup Revenue Growth 2021-2026 (\$ millions)

Figure 83. Manufacturing Cost Structure Analysis of Urine Collection Cup in 2026

Figure 84. Manufacturing Process Analysis of Urine Collection Cup

Figure 85. Industry Chain Structure of Urine Collection Cup

Figure 86. Channels of Distribution

Figure 87. Global Urine Collection Cup Sales Market Forecast by Region (2027-2032)

Figure 88. Global Urine Collection Cup Revenue Market Share Forecast by Region (2027-2032)

Figure 89. Global Urine Collection Cup Sales Market Share Forecast by Type (2027-2032)

Figure 90. Global Urine Collection Cup Revenue Market Share Forecast by Type (2027-2032)

Figure 91. Global Urine Collection Cup Sales Market Share Forecast by Application (2027-2032)

Figure 92. Global Urine Collection Cup Revenue Market Share Forecast by Application (2027-2032)

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