

Stoma/Ostomy Care Market by Product (Bags (Surgery Type (Ileostomy, Colostomy, Urostomy), System (One, Two-Piece), Usability (Drainable, Closed), Shape (Flat, Convex)), Accessories (Powder, Deodorant)), End User and Region - Global Forecast to 2026

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Abstracts

The global Stoma/Ostomy Care Market is expected to reach USD 3.2 billion by 2026 from an estimated USD 2.6 billion in 2021, at a CAGR of 4.3% from 2021 to 2026.

Ostomy is a surgical procedure that involves the removal of diseased portions of the gastrointestinal or urinary system, creating an opening in the abdominal wall that results in the external diversion of feces and urine. An ostomy may be permanent or temporary, and each procedure results in a stoma, which is the end of the small or large intestine that can be seen protruding through the abdominal wall. The market scope includes ostomy bags/pouches and accessories utilized by ostomates or patients undergoing colostomy, ileostomy, and urostomy.

The increasing target patient population, rising geriatric population, a growing number of awareness programs, and product development efforts are some factors driving the growth of this market. Colorectal cancer, bladder cancer, and inflammatory bowel disease are the major conditions necessitating ostomy surgeries. The treatment of colorectal cancer and inflammatory bowel disease (IBD) involves the surgical removal of the malignant tumor/part of the intestine. In some cases, the surgical opening is made through the abdomen to provide a new pathway for waste elimination, commonly referred to as an ostomy. A surge in the incidence of these conditions, coupled with the growing exposure to risk factors (such as changing food habits and growing use of

antibiotics in childhood), has increased the number of ostomy surgeries globally. Some of the major statistics related to the incidence of target indications are mentioned below:

According to GLOBOCAN 2020, colon and rectal cancers are the fifth and eighth most common cancers globally.

Approximately 550,000 new urinary bladder cancer cases were diagnosed worldwide in 2018 (Source: World Cancer Research Fund International).

Around 6.8 million cases of inflammatory bowel disease were diagnosed in 2017 globally. The prevalence rate of IBD increased from 79.5 per 100,000 population in 1990 to 84.3 per 100,000 population in 2017. The highest prevalence of IBD was observed in the US (464.5 per 100,000 population), followed by the UK (449.6 per 100,000 population) (Source: Global Burden of Disease Study 2017).

“Colostomy segment accounted for the largest share of global stoma/ostomy care market in 2020”

Based on surgery, the stoma/ostomy care market is segmented into ileostomy, colostomy, and urostomy. Colostomy is the most common type of surgical procedure performed globally. The rising incidence of colon cancer, stomach cancer, and IBD in developed and developing countries, coupled with the favorable reimbursement scenario in developed countries, is supporting the growth of this segment.

Colostomy dominates the stoma/ostomy care market, by surgery type. However, ileostomy is expected to grow at the highest rate over the forecast period. Colostomy segment accounted for the largest share of 43.33 % of the market and it is projected that it would reach to USD 1,380.4 million by 2026 from USD 1,121.5 million in 2021, at a CAGR of 4.2%.

A colostomy is a surgically created opening in the abdomen to bring the small part of the colon (large intestine) to the body surface, typically performed when a portion of the colon or the rectum of the patient is removed. This allows for the remaining part of the colon to be brought to the abdominal wall. Colostomy can be temporary or permanent, with permanent being more common.

Also, for instance in June 2021, Welland Medical Limited launched a new innovative

ostomy bag under the brand name Aurum Plus. It is available in both closed and drainable types.

“Hospitals and Specialty clinics segment accounted for the largest market share of the stoma/ostomy care market based on end user in 2020”

Based on end users, the stoma/ostomy care market is segmented into hospitals & specialty clinics, home care settings, and ambulatory surgical centers. The hospitals & specialty clinics segment accounted for the largest share of the stoma/ostomy care market in 2020.

The growing demand for home healthcare services is an important trend in the end-user market. Moreover, patients who have undergone colostomy, ileostomy, and urostomy surgeries often require ostomy care till the reversal of the surgery or during their lifetime. This has increased the demand for home care services. In recent times, ambulatory surgical centers have emerged as important end users in the stoma/ostomy care market.

This segment includes large and small hospitals, community hospitals, outpatient units, and hospitals associated with medical institutions, universities, and cancer clinics. The hospitals & specialty clinics segment accounted for 79.0% of the stoma/ostomy care market in 2020. The rising target patient population and the favorable reimbursement scenario in most developed countries are the major factors supporting the growth of this segment. For instance, according to a study by the University of Birmingham (2017), the prevalence of ulcerative colitis (UC) increased from 380 per 100,000 population in 2000 to 640 per 100,000 population in 2016. In China, stomach cancer and bladder cancer incidence were expected to increase from 454,000 and 62,400 to 523,000 and 71,500, respectively, from 2015 to 2020.

Hospitals and key players operating in this market are collaborating to provide training to healthcare professionals and nurses about ostomy care to increase the success rate associated with the procedure and reduce postoperative complications. This factor is expected to increase the number of patients undergoing colostomy, ileostomy, and urostomy procedures, further supporting the growth of this segment. For instance, the Wound, Ostomy and Continence Nurses Society (US) has designed a program on ‘Access to Wound, Ostomy, and Continence (WOC) Supplies.’ The program is aimed to protect and enhance patients’ access to WOC supplies.

In addition, Coloplast, a leading player in this market, has a program called ‘Access to

Healthcare' under which the company partners with various healthcare organizations and hospitals, such as the World Council of Enterostomal Therapists (WCET) and the China Nursing Association. Through this collaborative activity, the company provides training to healthcare professionals.

“Ostomy Bag segment accounted for the largest market share of the stoma/ostomy care market based on product type in 2020”

Based on product, the stoma/ostomy care market is segmented into two broad categories—ostomy bags and accessories. The ostomy bags segment accounted for the largest share of the stoma/ostomy care market in 2020. The large share of this segment is attributed to their high usage and low cost. However, the accessories segment is expected to grow at the highest CAGR of during the forecast period. Ostomy bags hold the largest share of the products market due to the growing number of patients suffering from target diseases (such as colorectal cancer and bladder cancer). Moreover, the efficient reimbursement system in developed countries and rising awareness aid market growth.

“The APAC market, by region, to register highest growth rate in the forecast period”

The Asia Pacific market is segmented into Japan, China, India, South Korea, Australia, and the Rest of Asia Pacific. In 2020, the APAC accounted for 23.84% of the stoma/ostomy care market and grow at the highest CAGR of 5.1%. Awareness initiatives by public and private organizations, a large patient population base for target diseases, and the rising geriatric population are the key factors driving the market growth. In addition, many market players are focusing on strengthening their distribution networks in APAC markets to capitalize on the growth opportunities in this region.

However, the limited availability of medical reimbursements, reluctance among patients to adopt technologically advanced products, and a lack of awareness among patients and healthcare professionals regarding the effective treatment methodologies for stoma care are expected to restrain market growth in the APAC.

A breakdown of the primary participants referred to for this report is provided below:

By Company Type: Tier 1–25%, Tier 2–37%, and Tier 3– 38%

By Designation: C-level–34%, Director-level–35%, and Others–31%

By Region: North America–24%, Europe–32%, Asia Pacific–28%, Latin America–10%, and the Middle East & Africa–6%

Prominent players in the stoma/ostomy care market include Coloplast Corp (Denmark), Hollister Incorporated (US), B. Braun Melsungen AG (Germany), ConvaTec Inc. (England), Salts Healthcare (UK), Welland Medical Limited (UK), and Flexicare Group Limited (UK),

Research Coverage

This report studies the stoma/ostomy care market based on product type, surgery type, end user and region. It also covers the factors affecting market growth, analyzes the various opportunities and challenges in the market, and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micromarkets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to five main regions (and the respective countries in these regions).

Reasons to Buy the Report

The report will enable established firms as well as entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them to garner a larger market share. Firms purchasing the report could use one or a combination of the below-mentioned strategies for strengthening their market presence.

This report provides insights on the following pointers:

Market Penetration: Comprehensive information on the product portfolios offered by the top players in the stoma/ostomy care market

Product Development/Innovation: Detailed insights on the upcoming trends, R&D activities, and product launches in the stoma/ostomy care market

Market Development: Comprehensive information on lucrative emerging regions

Market Diversification: Exhaustive information about new products, growing geographies, and recent developments in the stoma/ostomy care market

Competitive Assessment: In-depth assessment of market segments, growth strategies, revenue analysis, and products of the leading market players.

Contents

1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

1.2 MARKET DEFINITION

1.2.1 INCLUSIONS & EXCLUSIONS OF THE STUDY

1.3 MARKET SCOPE

FIGURE 1 MARKETS COVERED

1.3.1 YEARS CONSIDERED FOR THE STUDY

1.4 CURRENCY USED FOR THE STUDY

TABLE 1 EXCHANGE RATES UTILIZED FOR THE CONVERSION TO USD

1.5 KEY MARKET STAKEHOLDERS

1.6 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Indicative list of secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Breakdown of primaries

FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION

2.2 MARKET SIZE ESTIMATION METHODOLOGY

FIGURE 4 REVENUE MAPPING-BASED MARKET ESTIMATION

2.3 MARKET SIZE ESTIMATION

2.3.1 PRODUCT-BASED MARKET ESTIMATION

FIGURE 5 MARKET SIZE ESTIMATION: REVENUE-BASED APPROACH

2.3.2 EPIDEMIOLOGY-BASED MARKET SIZE ESTIMATION

2.3.3 PRIMARY RESEARCH VALIDATION

2.4 MARKET BREAKDOWN AND DATA TRIANGULATION

FIGURE 6 DATA TRIANGULATION METHODOLOGY

2.5 RESEARCH LIMITATIONS AND ASSUMPTIONS

2.5.1 ASSUMPTIONS FOR THE STUDY

2.6 RESEARCH LIMITATIONS

3 EXECUTIVE SUMMARY

FIGURE 7 STOMA/OSTOMY CARE MARKET, BY PRODUCT, 2020 VS. 2025 (USD MILLION)

FIGURE 8 STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2020 VS. 2025 (USD MILLION)

FIGURE 9 STOMA/OSTOMY CARE MARKET, BY END USER, 2020 VS. 2025 (USD MILLION)

FIGURE 10 OSTOMY ACCESSORIES MARKET SHARE, BY TYPE, 2020 VS. 2025

FIGURE 11 GEOGRAPHICAL SNAPSHOT OF THE STOMA/OSTOMY CARE MARKET

4 PREMIUM INSIGHTS

4.1 STOMA/OSTOMY CARE MARKET OVERVIEW

FIGURE 12 GROWING TARGET PATIENT POPULATION IS DRIVING THE GROWTH OF THE STOMA/OSTOMY CARE MARKET

4.2 STOMA/OSTOMY CARE MARKET SEGMENTAL OVERVIEW, 2020 (USD MILLION)

FIGURE 13 HOSPITALS & SPECIALITY CLINICS TO DOMINATE THE MARKET, BY END USER, IN 2020

4.3 EUROPE: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2021 VS. 2026 (USD MILLION)

FIGURE 14 COLOSTOMY SEGMENT DOMINATES THE EUROPEAN STOMA/OSTOMY CARE MARKET

4.4 GEOGRAPHIC SNAPSHOT OF THE STOMA/OSTOMY CARE MARKET

FIGURE 15 ASIA PACIFIC IS THE FASTEST-GROWING MARKET FOR OSTOMY PRODUCTS

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 16 STOMA/OSTOMY CARE MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Growing target patient population and prevalence of inflammatory bowel diseases

FIGURE 17 NUMBER OF NEW COLORECTAL CANCER CASES, BY COUNTRY (2020)

5.2.1.2 Rising geriatric population

FIGURE 18 NUMBER OF COLORECTAL CANCER CASES, BY AGE (2020)

FIGURE 19 NUMBER OF BLADDER CANCER CASES, BY AGE (2020)

5.2.1.3 Technological advancements

5.2.1.4 Favorable reimbursement system in developed countries

5.2.1.5 Awareness programs

5.2.2 RESTRAINTS

5.2.2.1 Complications associated with ostomy

5.2.2.2 Growing adoption of alternative treatments

5.2.2.3 Discomfort and other issues associated with ostomy bags

5.2.3 OPPORTUNITIES

5.2.3.1 Growth opportunities offered by emerging markets

5.2.3.2 Growing internet usage for online sales

5.2.3.3 Growing medical tourism in Asian countries

5.2.4 CHALLENGES

5.2.4.1 Disparities in reimbursement for ostomy supplies in emerging countries

5.3 REGULATORY LANDSCAPE

TABLE 2 INDICATIVE LIST OF REGULATORY AUTHORITIES GOVERNING THE STOMA/OSTOMY CARE MARKET

5.3.1 NORTH AMERICA

5.3.1.1 US

TABLE 3 CLASSIFICATION OF MEDICAL DEVICES BY US FDA

5.3.1.2 Canada

5.3.2 EUROPE

5.3.3 ASIA PACIFIC

5.3.3.1 India

5.3.3.2 China

TABLE 4 NMPA MEDICAL DEVICE CLASSIFICATION

5.3.3.3 Japan

TABLE 5 CLASSIFICATION OF MEDICAL DEVICES BY PMDA

5.4 COVID-19 IMPACT ON THE STOMA/OSTOMY CARE MARKET

5.5 REIMBURSEMENT SCENARIO

TABLE 6 NUMBER OF SUPPLIES COVERED BY MEDICARE 2021

5.6 PATENT ANALYSIS

5.6.1 PATENTS GRANTED FOR OSTOMY CARE

FIGURE 20 PATENTS GRANTED FOR OSTOMY CARE

(JANUARY 2011 TO NOVEMBER 2021)

5.6.2 JURISDICTION AND TOP APPLICANT ANALYSIS

TABLE 7 TOP 20 PATENT OWNERS FOR OSTOMY CARE

(JANUARY 2011 TO NOVEMBER 2021)

FIGURE 21 TOP 10 PATENT APPLICANTS FOR OSTOMY CARE

(JANUARY 2011 TO NOVEMBER 2021)

FIGURE 22 PATENTS FOR OSTOMY CARE, BY JURISDICTION

(JANUARY 2011 TO NOVEMBER 2021)

5.7 VALUE CHAIN ANALYSIS

FIGURE 23 VALUE CHAIN OF THE STOMA/OSTOMY CARE MARKET

5.8 PRICING TREND ANALYSIS

TABLE 8 AVERAGE PRICE OF STOMA/OSTOMY CARE PRODUCTS, BY DEVICE NAME, 2020 (USD)

5.9 PORTER'S FIVE FORCES ANALYSIS

TABLE 9 STOMA/OSTOMY CARE MARKET: PORTER'S FIVE FORCES ANALYSIS

5.9.1 THREAT OF NEW ENTRANTS

5.9.2 THREAT OF SUBSTITUTES

5.9.3 BARGAINING POWER OF SUPPLIERS

5.9.4 BARGAINING POWER OF BUYERS

5.9.5 INTENSITY OF COMPETITIVE RIVALRY

5.10 ECOSYSTEM LANDSCAPE

FIGURE 24 STOMA/OSTOMY CARE MARKET: ECOSYSTEM LANDSCAPE

6 STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE

6.1 INTRODUCTION

TABLE 10 STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2019–2026 (USD MILLION)

6.2 COLOSTOMY

6.2.1 A LARGE NUMBER OF COLOSTOMIES PERFORMED TO DRIVE MARKET GROWTH

TABLE 11 TYPES OF COLOSTOMY BASED ON STOMA LOCATION

TABLE 12 STOMA/OSTOMY CARE MARKET FOR COLOSTOMY, BY COUNTRY/REGION, 2019–2026 (USD MILLION)

6.3 ILEOSTOMY

6.3.1 INCREASING INCIDENCE OF ULCERATIVE COLITIS AND CROHN'S DISEASE TO SUPPORT MARKET GROWTH

TABLE 13 TYPES OF ILEOSTOMY PROCEDURES

TABLE 14 STOMA/OSTOMY CARE MARKET FOR ILEOSTOMY, BY COUNTRY/REGION, 2019–2026 (USD MILLION)

6.4 UROSTOMY

6.4.1 UROSTOMIES ARE COMMONLY PERFORMED FOR

THE TREATMENT OF BLADDER CANCER

TABLE 15 STOMA/OSTOMY CARE MARKET FOR UROSTOMY, BY COUNTRY/REGION, 2019–2026 (USD MILLION)

7 STOMA/OSTOMY CARE MARKET, BY PRODUCT

7.1 INTRODUCTION

TABLE 16 STOMA/OSTOMY CARE MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

7.2 OSTOMY BAGS

7.2.1 EUROPE IS THE LARGEST MARKET FOR OSTOMY BAGS

TABLE 17 OSTOMY BAGS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3 OSTOMY ACCESSORIES

TABLE 18 OSTOMY ACCESSORIES MARKET, BY TYPE, 2019–2026 (USD MILLION)

7.3.1 PASTES & POWDERS

7.3.1.1 These products protect the skin and increase the wear time of ostomy products

TABLE 19 PASTES & POWDERS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3.2 CREAMS

7.3.2.1 Creams help in adding moisture to dry skin caused due to the application and removal of skin barriers

TABLE 20 CREAMS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3.3 CLEANSERS

7.3.3.1 Cleansers are designed to clean the skin around the stoma

TABLE 21 CLEANSERS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3.4 DEODORANTS

7.3.4.1 Deodorants help in reducing odor emanation

TABLE 22 DEODORANTS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3.5 STOMA CAPS

7.3.5.1 Stoma caps help in living a normal life

TABLE 23 STOMA CAPS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3.6 BELTS

7.3.6.1 Belts enhance pouching system adhesion

TABLE 24 BELTS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3.7 POUCH COVERS

7.3.7.1 Pouch cover increases stoma pouch system aesthetics

TABLE 25 POUCH COVERS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3.8 TAPES

7.3.8.1 Tapes help in increasing the adhesion of the skin barrier

TABLE 26 TAPES MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3.9 SEALS/BARRIER RINGS

7.3.9.1 Barrier rings help protect peristomal skin

TABLE 27 SEALS/BARRIER RINGS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3.10 POUCH CLOSERS

7.3.10.1 Pouch closers form a small segment of the market

TABLE 28 POUCH CLOSERS MARKET, BY REGION, 2019–2026 (USD MILLION)

8 STOMA/OSTOMY CARE MARKET, BY END USER

8.1 INTRODUCTION

TABLE 29 STOMA/OSTOMY CARE MARKET, BY END USER, 2019–2026 (USD MILLION)

8.2 HOSPITALS & SPECIALTY CLINICS

8.2.1 A LARGE NUMBER OF OSTOMY PROCEDURES PERFORMED IN HOSPITALS IS SUPPORTING THE GROWTH OF THIS SEGMENT

TABLE 30 STOMA/OSTOMY CARE MARKET FOR HOSPITALS & SPECIALTY CLINICS, BY REGION, 2019–2026 (USD MILLION)

8.3 HOME CARE SETTINGS

8.3.1 HOME CARE SETTINGS ARE THE SECOND-LARGEST END USERS OF OSTOMY PRODUCTS

TABLE 31 STOMA/OSTOMY CARE MARKET FOR HOME CARE SETTINGS, BY REGION, 2019–2026 (USD MILLION)

8.4 AMBULATORY SURGICAL CENTERS

8.4.1 AMBULATORY CENTERS PROVIDE SAME-DAY CARE AND ARE FINDING INCREASING PREFERENCE

TABLE 32 STOMA/OSTOMY CARE MARKET FOR AMBULATORY SURGICAL CENTERS, BY REGION, 2019–2026 (USD MILLION)

9 STOMA/OSTOMY CARE MARKET, BY REGION

9.1 INTRODUCTION

FIGURE 25 GEOGRAPHIC SNAPSHOT OF THE STOMA/OSTOMY CARE MARKET

TABLE 33 STOMA/OSTOMY CARE MARKET, BY REGION, 2019–2026 (USD MILLION)

9.2 EUROPE

FIGURE 26 EUROPE: STOMA/OSTOMY CARE MARKET SNAPSHOT

TABLE 34 EUROPE: STOMA/OSTOMY CARE MARKET, BY COUNTRY, 2019–2026

(USD MILLION)

TABLE 35 EUROPE: STOMA/OSTOMY CARE MARKET, BY PRODUCT, 2019–2026

(USD MILLION)

TABLE 36 EUROPE: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

TABLE 37 EUROPE: OSTOMY CARE ACCESSORIES MARKET, BY TYPE,
2019–2026 (USD MILLION)

TABLE 38 EUROPE: STOMA/OSTOMY CARE MARKET, BY END USER, 2019–2026
(USD MILLION)

9.2.1 GERMANY

9.2.1.1 Favorable reimbursement scenario to support market growth

TABLE 39 GERMANY: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

9.2.2 UK

9.2.2.1 Rising patient population to support the adoption of ostomy products in the
country

TABLE 40 UK: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2019–2026
(USD MILLION)

9.2.3 FRANCE

9.2.3.1 Growing initiatives by the government to propel market growth

TABLE 41 FRANCE: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

9.2.4 ITALY

9.2.4.1 Initiatives by private and government organizations to raise awareness about
ostomy care are driving market growth in Italy

TABLE 42 ITALY: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

9.2.5 SPAIN

9.2.5.1 The growing geriatric population has driven demand for ostomy procedures in
Spain

TABLE 43 SPAIN: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

9.2.6 REST OF EUROPE

TABLE 44 ROE: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2019–2026
(USD MILLION)

9.3 NORTH AMERICA

TABLE 45 NORTH AMERICA: STOMA/OSTOMY CARE MARKET, BY COUNTRY,
2019–2026 (USD MILLION)

TABLE 46 NORTH AMERICA: STOMA/OSTOMY CARE MARKET, BY PRODUCT,

2019–2026 (USD MILLION)

TABLE 47 NORTH AMERICA: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2019–2026 (USD MILLION)

TABLE 48 NORTH AMERICA: OSTOMY CARE ACCESSORIES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 49 NORTH AMERICA: STOMA/OSTOMY CARE MARKET, BY END USER, 2019–2026 (USD MILLION)

9.3.1 US

9.3.1.1 Favorable reimbursement scenario for ostomy supplies to support market growth in the US

TABLE 50 US: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2019–2026 (USD MILLION)

9.3.2 CANADA

9.3.2.1 A surge in the incidence of target diseases and favorable government guidelines to support market growth

TABLE 51 CANADA: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2019–2026 (USD MILLION)

9.4 ASIA PACIFIC

FIGURE 27 ASIA PACIFIC: STOMA/OSTOMY CARE MARKET SNAPSHOT

TABLE 52 ASIA PACIFIC: STOMA/OSTOMY CARE MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 53 ASIA PACIFIC: STOMA/OSTOMY CARE MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 54 ASIA PACIFIC: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2019–2026 (USD MILLION)

TABLE 55 ASIA PACIFIC: OSTOMY CARE ACCESSORIES MARKET, BY TYPE, –2026 (USD MILLION)

TABLE 56 ASIA PACIFIC: STOMA/OSTOMY CARE MARKET, BY END USER, 2019–2026 (USD MILLION)

9.4.1 JAPAN

9.4.1.1 Rising number of cancer cases to propel market growth

TABLE 57 JAPAN: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2019–2026 (USD MILLION)

9.4.2 CHINA

9.4.2.1 Increasing patient pool and government initiatives for healthcare development are fueling the market growth

TABLE 58 CHINA: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2019–2026 (USD MILLION)

9.4.3 INDIA

9.4.3.1 Rising patient population is propelling the market growth

TABLE 59 INDIA: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

9.4.4 AUSTRALIA

9.4.4.1 Government initiatives to support market growth

TABLE 60 AUSTRALIA: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE

2019–2026 (USD MILLION)

9.4.5 SOUTH KOREA

9.4.5.1 Increasing R&D activities in the country to drive market growth

TABLE 61 SOUTH KOREA: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

9.4.6 REST OF APAC

TABLE 62 ROAPAC: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

9.5 LATIN AMERICA

TABLE 63 LATIN AMERICA: STOMA/OSTOMY CARE MARKET, BY COUNTRY,
2019–2026 (USD MILLION)

TABLE 64 LATIN AMERICA: STOMA/OSTOMY CARE MARKET, BY PRODUCT,
2019–2026 (USD MILLION)

TABLE 65 LATIN AMERICA: STOMA/OSTOMY CARE MARKET, BY SURGERY
TYPE, 2019–2026 (USD MILLION)

TABLE 66 LATIN AMERICA: OSTOMY CARE ACCESSORIES MARKET, BY TYPE,
2019–2026 (USD MILLION)

TABLE 67 LATIN AMERICA: STOMA/OSTOMY CARE MARKET, BY END USER,
2019–2026 (USD MILLION)

9.5.1 BRAZIL

9.5.1.1 Growing adoption of healthcare insurance in the country to support market
growth

TABLE 68 BRAZIL: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

9.5.2 MEXICO

9.5.2.1 Increasing awareness programs are fueling the market growth

TABLE 69 MEXICO: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

9.5.3 REST OF LATIN AMERICA

TABLE 70 ROLA: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE,
2019–2026 (USD MILLION)

9.6 MIDDLE EAST & AFRICA

9.6.1 IMPROVING HEALTHCARE INFRASTRUCTURE AND INCREASING PUBLIC-PRIVATE INVESTMENTS TO DRIVE MARKET GROWTH IN THE MEA

TABLE 71 MEA: STOMA/OSTOMY CARE MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 72 MEA: STOMA/OSTOMY CARE MARKET, BY SURGERY TYPE, 2019–2026 (USD MILLION)

TABLE 73 MEA: OSTOMY CARE ACCESSORIES MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 74 MEA: STOMA/OSTOMY CARE MARKET, BY END USER, 2019–2026(USD MILLION)

10 COMPETITIVE LANDSCAPE

10.1 INTRODUCTION

FIGURE 28 KEY DEVELOPMENTS BY LEADING PLAYERS IN THE STOMA/OSTOMY CARE MARKET, 2018–2021

10.2 REVENUE SHARE ANALYSIS

FIGURE 29 REVENUE SHARE ANALYSIS OF THE TOP PLAYERS IN THE STOMA/OSTOMY CARE MARKET

10.3 MARKET SHARE ANALYSIS

FIGURE 30 STOMA/OSTOMY CARE MARKET SHARE, BY KEY PLAYER, 2020

10.4 COMPETITIVE LEADERSHIP MAPPING: COMPANY EVALUATION QUADRANT (2020)

10.4.1 STARS

10.4.2 EMERGING LEADERS

10.4.3 PERVASIVE PLAYERS

10.4.4 PARTICIPANTS

FIGURE 31 STOMA/OSTOMY CARE MARKET: COMPETITIVE LEADERSHIP MAPPING, 2020

10.5 COMPETITIVE LEADERSHIP MAPPING: START-UP/SME EVALUATION QUADRANT (AS OF 2020)

10.5.1 PROGRESSIVE COMPANIES

10.5.2 RESPONSIVE COMPANIES

10.5.3 DYNAMIC COMPANIES

10.5.4 STARTING BLOCKS

FIGURE 32 STOMA/OSTOMY CARE MARKET: COMPETITIVE LEADERSHIP MAPPING (SMES/START-UPS)

10.6 COMPETITIVE BENCHMARKING

TABLE 75 PRODUCT FOOTPRINT ANALYSIS OF THE TOP PLAYERS IN THE STOMA/OSTOMY CARE MARKET

TABLE 76 COMPANY FOOTPRINT ANALYSIS IN THE STOMA/OSTOMY CARE MARKET

10.7 COMPETITIVE SCENARIO (2018–2021)

10.7.1 PRODUCT LAUNCHES

10.7.2 DEALS

10.7.3 OTHER DEVELOPMENTS

11 COMPANY PROFILES

11.1 KEY PLAYERS

(Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats))*

11.1.1 COLOPLAST CORP

TABLE 77 COLOPLAST CORP: BUSINESS OVERVIEW

FIGURE 33 COLOPLAST CORP: COMPANY SNAPSHOT (2020)

11.1.2 CONVATEC

TABLE 78 CONVATEC INC.: BUSINESS OVERVIEW

FIGURE 34 CONVATEC INC.: COMPANY SNAPSHOT (2020)

11.1.3 B. BRAUN MELSUNGEN AG

TABLE 79 B. BRAUN MELSUNGEN AG: BUSINESS OVERVIEW

FIGURE 35 B. BRAUN MELSUNGEN AG: COMPANY SNAPSHOT (2020)

11.1.4 HOLLISTER INCORPORATED

TABLE 80 HOLLISTER INCORPORATED: BUSINESS OVERVIEW

11.1.5 ALCARE CO. LTD.

TABLE 81 ALCARE CO. LTD.: BUSINESS OVERVIEW

11.1.6 CYMED MICRO SKIN

TABLE 82 CYMED MICRO SKIN: BUSINESS OVERVIEW

11.1.7 NU-HOPE LABORATORIES, INC.

TABLE 83 NU-HOPE LABORATORIES, INC.: BUSINESS OVERVIEW

11.1.8 FLEXICARE (GROUP) LIMITED

TABLE 84 FLEXICARE (GROUP) LIMITED: BUSINESS OVERVIEW

11.1.9 SALTS HEALTHCARE

TABLE 85 SALTS HEALTHCARE: BUSINESS OVERVIEW

11.1.10 WELLAND MEDICAL LIMITED

TABLE 86 WELLAND MEDICAL LIMITED: BUSINESS OVERVIEW

11.1.11 3M

TABLE 87 3M: BUSINESS OVERVIEW

FIGURE 36 3M: COMPANY SNAPSHOT (2020)

11.1.12 SMITH & NEPHEW

TABLE 88 SMITH & NEPHEW: BUSINESS OVERVIEW

FIGURE 37 SMITH & NEPHEW: COMPANY SNAPSHOT (2020)

11.1.13 MARLEN MANUFACTURING & DEVELOPMENT COMPANY

TABLE 89 MARLEN MANUFACTURING & DEVELOPMENT COMPANY: BUSINESS OVERVIEW

11.1.14 TORBOT GROUP INC.

TABLE 90 TORBOT GROUP INC: BUSINESS OVERVIEW

11.1.15 PERMA-TYPE COMPANY INC.

TABLE 91 PERMA-TYPE COMPANY INC.: BUSINESS OVERVIEW

11.2 OTHER PLAYERS

11.2.1 SCAPA HEALTHCARE

TABLE 92 SCAPA HEALTHCARE: BUSINESS OVERVIEW

11.2.2 TYTEX A/S

TABLE 93 TYTEX A/S: BUSINESS OVERVIEW

11.2.3 PROWESS CARE

TABLE 94 PROWESS CARE: BUSINESS OVERVIEW

11.2.4 SAFE N SIMPLE

TABLE 95 SAFE N SIMPLE: BUSINESS OVERVIEW

11.2.5 SCHENA OSTOMY TECHNOLOGIES INC.

TABLE 96 SCHENA OSTOMY TECHNOLOGIES INC.: BUSINESS OVERVIEW

11.2.6 AVITR FARMICA

TABLE 97 AVITR FARMICA: BUSINESS OVERVIEW

11.2.7 TRIO HEALTHCARE LTD.

TABLE 98 TRIO HEALTHCARE LTD.: BUSINESS OVERVIEW

11.2.8 CRIMSON HEALTHCARE PVT. LTD.

TABLE 99 CRIMSON HEALTHCARE PVT. LTD.: BUSINESS OVERVIEW

11.2.9 FORTIS MEDICAL PRODUCTS

TABLE 100 FORTIS MEDICAL PRODUCTS: BUSINESS OVERVIEW

11.2.10 ANGIPLAST PVT. LTD.

TABLE 101 ANGIPLAST PVT. LTD.: BUSINESS OVERVIEW

11.2.11 OAKMED HEALTHCARE

TABLE 102 OAKMED HEALTHCARE: BUSINESS OVERVIEW

11.2.12 WUJIANG EVERGREEN EX/IM CO. LTD.

TABLE 103 WUJIANG EVERGREEN EX/IM CO. LTD.: BUSINESS OVERVIEW

11.2.13 ZHEJIANG AILEBAO MEDICAL TECHNOLOGIES CO. LTD.

TABLE 104 ZHEJIANG AILEBAO MEDICAL TECHNOLOGIES CO. LTD.: BUSINESS

OVERVIEW

11.2.14 EAKIN HEALTHCARE GROUP

TABLE 105 EAKIN HEALTHCARE GROUP: BUSINESS OVERVIEW

11.2.15 POLARSEAL

TABLE 106 POLARSEAL: BUSINESS OVERVIEW

*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

12 APPENDIX

12.1 DISCUSSION GUIDE

12.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

12.3 AVAILABLE CUSTOMIZATIONS

12.4 RELATED REPORTS

12.5 AUTHOR DETAILS

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