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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

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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.

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*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

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