

# Bladder Scanners - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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## Abstracts

The Bladder Scanners Market size is estimated at USD 159.66 million in 2024, and is expected to reach USD 214.67 million by 2029, growing at a CAGR of 6.10% during the forecast period (2024-2029).

A bladder scanner is a non-invasive ultrasound device or tool that provides a virtual two or three-dimensional (3D) or (2D) image of the bladder and the volume of urine retained within the bladder for diagnosing, managing, and treating urinary outflow dysfunction. The increasing prevalence of urological diseases is driving the growth of the bladder scanner market.

The growing burden of cancer related to the urinary tract creates the need for diagnostics and scanning devices and thus propels the growth of the market. For instance, according to the data published by the American Society of Clinical Oncology (ASCO) in March 2023, an estimated 82,290 adults (62,420 men and 19,870 women) in the United States were diagnosed with bladder cancer in 2023. Similarly, according to the data by the National Cancer Institute (NCI) published in December 2022, bladder cancer was the sixth most common cancer, with around 81,180 new cases in 2022 in the United States. The same source also stated that bladder cancer is more common in men than women. Men have a roughly 1 in 27 chance of developing bladder cancer during their lifetime, and women have a 1 in 89 chance. Thus, an increase in the burden of bladder cancer is expected to augment the demand for bladder scanners, thereby boosting the market growth during the forecast period.

Also, the presence of technologically advanced bladder scanners in the market is expected to propel the market's growth. For instance, the BioCon-1100 bladder scanner developed by Mcube Technology is designed to provide accurate, non-invasive bladder

volume measurements, aiding healthcare professionals in their diagnostic and treatment processes. The device scans in approximately 2 seconds, allowing for efficient patient assessments and minimal discomfort. Thus, the presence of such technologically advanced products in the market is expected to propel the market growth.

Moreover, in December 2022, Otsuka Pharmaceutical Factory launched Liliun One, a medical bladder scanner specialized for single measurement that measures urine volume in the bladder. Thus, such developments are also expected to boost the market's growth.

Thus, the high burden of urological conditions and technological advancement in scanners will propel the market's growth during the forecast period. However, stringent regulatory reforms are expected to hinder market growth during the forecast period.

## Bladder Scanners Market Trends

### The Portable Bladder Scanners Segment is Expected to Hold a Significant Market Share During the Forecast Period

Portable bladder scanners are ultrasound devices that use automated technology to register bladder volume digitally, including post-void residual (PVR) volume, and provide three-dimensional images of the bladder.

The major advantage of the portable ultrasound bladder scanner is that it is a user-friendly diagnostic procedure with high-end accuracy. Another main benefit of a portable bladder ultrasound scanner is its portability, reliability, cost-effectiveness, and non-invasiveness. The increased occurrence of cancer related to the urinary tract creates the need for diagnostics and scanning devices, propelling the growth of the market studied. For instance, as per the data updated by the National Cancer Center, an estimated 24,800 new cases of bladder cancer were diagnosed in Japan in 2023. Thus, the increasing prevalence of bladder cancer is expected to increase the demand for portable bladder cancer scanners, which is expected to increase segmental growth during the forecast period.

The increasing prevalence of urological diseases is also a key factor for the growth of the bladder scanner market. For instance, according to the data updated by the Canadian Agency for Drugs and Technologies in Health in January 2023, for older adults with urinary incontinence in a personal care home setting, using a bladder

scanner to assist traditional urinary incontinence care may reduce the amount of daytime urine loss and use of incontinence pads without increasing caregivers' care burden. The source also stated that adding a bladder scanner to urinary incontinence care may not impact patient quality of life, mental state, depression, physical function, and level of motivation. Thus, the increasing usage of portable bladder scanners for the management of such diseases is expected to boost the market growth.

Product launches by the key players are also expected to surge the segment growth. For instance, in October 2023, Clarius launched its first dual-array wireless handheld scanner, enabling whole-body views of superficial to deep anatomy. This device offers superior image quality and exceptional versatility for real-time imaging of both superficial and deep anatomy at the bedside. It suits a wide range of clinical applications while improving workflow continuity.

Therefore, the increasing prevalence of urological diseases and the rising preference for portable bladder scanners are the key factors for the growth of the bladder scanner market.

### North America is Expected to Witness Significant Growth in the Market During the Forecast Period

North America is expected to witness significant growth in the bladder scanner market globally due to the rising prevalence of urological diseases and high healthcare expenditure. New product approvals, the growing prevalence of urological disorders, increasing diagnostic procedures, and increasing utilization of mobile portable ultrasound devices in clinics and hospitals contribute to the growth of the bladder scanners market.

For instance, as per an article published by PLOS Pathogens in February 2024, urinary tract infections (UTIs) rank near the top of the long list of medical issues that can affect humans. The source also states that they are the most common reason for outpatient visits in the United States, and clinics around the world see millions of cases annually. Hence, increasing chronic diseases led to an increased demand for bladder scanners in the region.

Adopting artificial intelligence in the devices helps improve workflow, accuracy, detection, and disease diagnosis. Market players' launches of technically advanced

products also augment the market's growth. For instance, in January 2022, ClariusMobile Health introduced a third-generation product line of high-performance, handheld wireless ultrasound scanners for all medical specialists, including ClariusHD3, in the United States. ClariusHD3 is a pocket-sized scanner that can detect multi-specialty disorders, including sag bladder and prostate.

Hence, due to the aforementioned factors, such as the launch of new products and the growing prevalence of urinary disorders, the bladder scanners market is anticipated to propel during the forecast period in North America.

### Bladder Scanners Industry Overview

The bladder scanner market is moderately competitive and consists of several major players. In terms of market share, a few major players dominate the market. Market participants are adopting numerous strategies to sustain market competition, including acquisitions and collaborations. Some market players are GE Healthcare Inc., Roper Technologies Inc. (Verathon Inc.), McubeTechnology Co. Ltd, Vitacon, and dBMEDx.

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