

# Urinary Incontinence Device Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### Urinary Incontinence Device Market Summary

#### Introduction

Urinary incontinence devices, including catheters, slings, and neuromodulation systems, are used to manage bladder control issues affecting approximately 400 million people globally. The market is driven by the high prevalence of stress urinary incontinence (SUI), particularly among women, and urge incontinence in men post-prostate surgery. An aging population, projected to reach 2.1 billion over 60 by 2050, significantly boosts demand, as over 50% of nursing home residents are affected. Technological advancements, such as minimally invasive procedures and smart monitoring, further propel growth. The global urinary incontinence device market is projected to reach between USD 2.8 billion and USD 4.2 billion in 2025, with a CAGR of 8.0% to 12.0% through 2030.

#### Regional Analysis

**North America:** The U.S. leads due to high SUI prevalence and advanced healthcare systems, with Canada focusing on elderly care.

**Europe:** Germany, France, and the UK drive demand with robust urology programs.

**Asia Pacific:** China and India see rapid growth due to rising awareness and healthcare investments, while Japan emphasizes home care solutions.

Rest of the World: Brazil enhances urological care, and the Middle East invests in advanced medical devices.

### Application Analysis

Hospital & Clinic: Expected growth of 8.2%-12.2%, driven by surgical interventions. Trends focus on minimally invasive devices.

Home Care: Projected growth of 8.0%-12.0%, linked to patient preference for non-invasive solutions. Developments emphasize wearable devices.

Others: Anticipated growth of 7.8%-11.8%, covering long-term care facilities. Advances prioritize discreet, comfortable designs.

### Type Analysis

Urinary Catheters (Indwelling Catheters, Intermittent Catheters): Expected growth of 8.1%-12.1%, driven by widespread use in hospitals and home care. Trends highlight microhole technology for comfort.

Artificial Urinary Sphincters: Projected growth of 7.9%-11.9%, used for severe incontinence. Innovations focus on biocompatible materials.

Electrical Stimulation Devices: Anticipated growth of 8.3%-12.3%, driven by non-invasive therapy. Advances include smart biofeedback systems.

### Key Market Players

Leading companies include Boston Scientific Corporation, known for Advantage Fit slings; Medtronic, offering InterStim X; Johnson & Johnson, focusing on urological solutions; Teleflex Incorporated, specializing in catheters; Coloplast Corp, innovating with Luja catheters; ConvaTec, providing home care devices; Cook Group, advancing surgical solutions; Laborie, emphasizing neuromodulation; Stryker, supporting urology; and Hollister Incorporated, known for discreet designs.

### Porter's Five Forces Analysis

? Threat of New Entrants: Moderate, due to regulatory barriers, though startups can disrupt with innovative designs.

? Threat of Substitutes: Low, as devices are essential for incontinence management.

? Bargaining Power of Buyers: Moderate, with hospitals seeking cost-effective, comfortable devices, but clinical needs limit options.

? Bargaining Power of Suppliers: Low, given multiple material suppliers.

? Competitive Rivalry: High, with firms competing on minimally invasive technologies, comfort, and smart features.

## Market Opportunities and Challenges

### Opportunities:

? High incontinence prevalence, affecting 400 million people, drives demand.

? The aging population, projected at 2.1 billion by 2050, boosts device adoption.

? Technological advancements, like Coloplast's Luja catheters and Medtronic's InterStim X, improve patient comfort by 30%.

? Rising patient awareness, amplified through platforms like social media, increases treatment uptake.

? The shift toward home care creates demand for discreet, wearable devices.

### Challenges:

? High costs of advanced devices limit adoption in low-income regions.

? Regulatory delays for smart and neuromodulation technologies slow market entry.

? Social stigma around incontinence hampers patient uptake, as does the need for trained urologists in rural areas.

## Market News

? In May 2024, Coloplast launched Luja for women, a next-generation intermittent

catheter with microhole technology, starting in Denmark and Italy.

? In November 2024, Boston Scientific acquired Axonics, Inc., strengthening its sacral neuromodulation portfolio.

? In February 2022, Medtronic received FDA approval for InterStim X, a recharge-free neuromodulation device.

? In November 2023, Coloplast invested USD 100.5 million in a new factory in Portugal to manufacture intermittent catheters.

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