

Ostomy Drainage Bags Market Forecasts to 2030 – Global Analysis By Product Type (Ileostomy Bags, One-Piece Systems, Colostomy Bags, Urostomy Bags, Two-Piece Systems, Closed-End Pouches, Drainable Pouches, and Other Product Types), Usage Type, System Type, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Ostomy Drainage Bags Market is accounted for \$1.86 billion in 2024 and is expected to reach \$2.52 billion by 2030 growing at a CAGR of 5.2% during the forecast period. Patients who have had ostomy surgery, such as a colostomy, ileostomy, or urostomy, use ostomy drainage bags. When the body is unable to eliminate waste materials normally through the digestive or urinary systems, these bags are used to collect waste products like stool or pee. Ostomy drainage bags are available in one-piece and two-piece systems and are made for comfort, convenience, and hygiene. For ostomy patients, they offer vital care that enhances quality of life and guards against infection.

According to the World Ageing 2019 report, in 2019, there were around 703 million people aged 65 years or more in the world. According to Nicolas Patel, in an article published in 2020, inflammatory bowel disease is most prevalent in South America at approximately 21%, and least prevalent in Southeast Asia at 7%.

Market Dynamics:

Driver:

Rising incidence of gastrointestinal and urological disorders

The need for ostomy drainage bags is being driven by the rising prevalence of gastrointestinal and urological conditions, including bladder cancer, inflammatory bowel disease, and colorectal cancer. Ostomy drainage bags must be used for waste collection because these illnesses frequently necessitate surgical procedures that create a stoma. The growing prevalence of these disorders, particularly among the aging population, contributes to the market's expansion. The availability of cutting-edge ostomy products and improvements in surgical procedures also contribute to the market's expansion.

Restraint:

Skin irritation and allergic reactions

Skin irritation and allergic reactions are common challenges associated with the use of ostomy drainage bags. Prolonged contact with the skin can lead to irritation, rashes, and allergic responses, causing discomfort and potential complications for patients. These issues can impact patient compliance and satisfaction with ostomy care products. Manufacturers are continuously working to develop more skin-friendly materials and designs to mitigate these problems. However, the risk of skin irritation and allergic reactions remains a significant restraint to the market's growth.

Opportunity:

Rising prevalence of obesity

Obesity is a risk factor for various gastrointestinal and urological disorders, foremost to an increased need for surgical interventions and ostomy care. The growing number of obese individuals seeking medical treatment drives the demand for ostomy drainage bags. Additionally, the focus on improving patient outcomes and quality of life for obese patients supports the adoption of advanced ostomy products. As a result, the rising prevalence of obesity presents significant opportunities for the market's growth.

Threat:

Competition from alternative products

The ostomy drainage bags market faces competition from alternative products, such as

absorbent products and other waste management solutions. These alternatives may offer different benefits, such as reduced skin irritation or improved convenience, attracting potential customers away from traditional ostomy drainage bags. The availability of a variety of options can impact market share and growth prospects for ostomy drainage bags. Manufacturers need to innovate and differentiate their products to stay competitive in the market.

Covid-19 Impact

The COVID-19 pandemic originally had a negative effect on the market for ostomy drainage bags because it caused interruptions in supply chains, production, and healthcare services. Elective surgery delays and fewer hospital stays resulted in a short-term decline in ostomy product demand. Nonetheless, demand increased as healthcare institutions adjusted, especially as telemedicine and homecare options expanded. As patients became more knowledgeable about ostomy management, the post-pandemic period saw a steady rebound and expansion.

The urostomy bags segment is expected to be the largest during the forecast period

The urostomy bags segment is expected to account for the largest market share during the forecast period, driven by the rising incidence of urological conditions include congenital urinary abnormalities, bladder cancer, and urine incontinence. The patient experience is being enhanced by developments in urostomy bag technology, such as increased comfort, discrete designs, and improved skin protection. Additional factors driving the market's expansion include an aging population, an increase in urostomy procedures, and greater awareness of urostomy care.

The hospitals segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the hospitals segment is predicted to witness the highest growth rate, due to the high number of ostomy surgeries performed in clinical settings. Increased cases of colorectal cancer, urological conditions, and other gastrointestinal diseases contribute to the demand for ostomy bags. Additionally, hospitals provide critical post-operative care and patient education, boosting product adoption. The growing focus on patient comfort, safety, and advanced surgical techniques further drives the demand for ostomy drainage bags in hospitals.

Region with largest share:

During the forecast period, Asia Pacific region is expected to hold the largest market share, due to the rising prevalence of chronic diseases like colorectal cancer and urological disorders. Increasing healthcare infrastructure, improved access to ostomy care, and greater patient awareness contribute to market growth. The aging population, coupled with advancements in ostomy product designs offering comfort and convenience, further fuel demand. Additionally, the growing focus on enhancing healthcare services in countries like India and China supports market expansion.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to advanced healthcare infrastructure, widespread insurance coverage, and increasing awareness about ostomy care contribute to market growth. Moreover, technological advancements in ostomy products, such as improved comfort, skin protection, and discreet designs, further boost demand.

Key players in the market

Some of the key players profiled in the Ostomy Drainage Bags Market include Coloplast A/S, Hollister Incorporated, B. Braun Melsungen AG, Convatec Group PLC, Smith & Nephew, Medline Industries, Inc., 3M Health Care, Asid Bonz, Novartis AG, Hogy Medical Co., Ltd., Alcare Co., Ltd., Genairex, Inc., Vogt Medical, Marlen Manufacturing & Development Co., Lohmann & Rauscher GmbH & Co. KG, Surgical Appliance Industries, and Molnlycke Health Care.

Key Developments:

In February 2025, Novartis announced that it has entered into an agreement to acquire Anthos Therapeutics, Inc., a Boston-based, privately held, clinical-stage biopharmaceutical company with abelacimab, a late-stage medicine in development for the prevention of stroke and systemic embolism in patients with atrial fibrillation.

In October 2024, Convatec collaborates with AbbVie for VYALEV™ therapy for the treatment of advanced Parkinson's disease in the United States. Convatec welcomes further regulatory approvals to support our collaboration with AbbVie, a leading global biopharmaceutical company.

Product Types Covered:

Ileostomy Bags

One-Piece Systems

Colostomy Bags

Urostomy Bags

Two-Piece Systems

Closed-End Pouches

Drainable Pouches

Other Product Types

Usage Types Covered:

Multi-use Bags

Single-use Bags

System Types Covered:

One-Piece System

Two-piece System

Applications Covered:

Bladder Cancer

Inflammatory Bowel Disease (IBD)

Colorectal Cancer

Other Applications

End Users Covered:

Ambulatory Surgical Centers (ASCs)

Hospitals

Homecare Settings

Nursing Homes and Assisted Living

Long-Term Care Facilities

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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