

Incontinence And Ostomy Care Products Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Incontinence Care Products (Absorbents, Incontinence Bags, Others), Ostomy Care Products (Ostomy Bags, Deodorants, Skin Barriers, Irrigation Products)), By Region, and By Competition, 2020-2030F

<https://marketpublishers.com/r/IB2E7AB539E5EN.html>

Date: January 2025

Pages: 180

Price: US\$ 4,500.00 (Single User License)

ID: IB2E7AB539E5EN

Abstracts

Global Incontinence And Ostomy Care Products Market was valued at USD 18.75 Billion in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.85% through 2030. The market is experiencing notable growth in the foreseeable future due to several key factors. These include a rising number of patients with urological ailments and bladder dysfunction, an increasing frequency of ostomy surgeries related to bowel issues, and a growing elderly population. A significant uptick in urological disorders like urinary retention, urinary incontinence, benign prostatic hyperplasia, cystitis, and kidney stones has contributed to bladder dysfunction. A substantial portion of the population is grappling with bladder control problems, such as leakage, urinary incontinence, or retention. Moreover, various medical conditions and chronic diseases, such as Parkinson's, stroke, prostate cancer, and diabetes mellitus, elevate the risk of urinary incontinence.

Key Market Drivers

Aging Population

The global landscape is undergoing a profound demographic transformation, with the aging population emerging as a driving force behind several industries. By 2030, 1 in 6

individuals globally will be aged 60 or older, reflecting a significant demographic shift. The global population in this age group is projected to rise from 1 billion in 2020 to 1.4 billion. Looking ahead to 2050, the population of individuals aged 60 and above is expected to double, reaching 2.1 billion. Notably, the number of people aged 80 and older will see a threefold increase during the same period, surging from 2020 figures to 426 million by mid-century. One such sector experiencing substantial growth is the market for incontinence and ostomy care products. As the elderly demographic continues to expand, these products have become a crucial element in preserving the dignity and quality of life of a significant portion of the global population.

Aging is often accompanied by a higher risk of urinary and fecal incontinence. The weakening of pelvic floor muscles, reduced bladder and bowel control, and age-related medical conditions contribute to the increased prevalence of incontinence among older adults. This demographic trend is a primary driver for the demand of incontinence products, such as adult diapers, pads, and undergarments.

The aging population is also more likely to experience medical conditions necessitating ostomy surgeries. Up to 35% of elderly patients in the Netherlands undergo ostomy procedures following colorectal cancer (CRC) surgery. Data from the Dutch Total Mesorectal Excision trial reveal a stark contrast in outcomes, with a mortality rate of 57% in elderly patients compared to 8% in younger patients in cases of anastomotic leakage. These findings underscore the critical need for tailored surgical approaches and postoperative care for older patients. Such conditions can include colorectal cancer, diverticulitis, and inflammatory bowel diseases. Consequently, the demand for ostomy bags and related products has surged among the elderly, providing them with the means to maintain their independence and active lifestyles post-surgery.

Advancements in healthcare, nutrition, and medical technology have contributed to increased life expectancy. As individuals live longer, they are more prone to age-related health challenges, including incontinence and ostomy needs. The longer individuals live, the longer they may require these products, resulting in sustained market growth.

Today's seniors are more active and engaged than ever before. Across all age groups, four of the top five most popular activities are active pursuits, including walking or jogging (14%), outdoor maintenance (13%), playing sports (8.9%), and other forms of physical activity (8.7%). This trend persists among individuals aged 65–75, with active engagement remaining a key preference. Even among those aged 80–84, three of the top five favorite activities involve physical activity, highlighting the enduring importance of active lifestyles across advanced age groups. They seek to maintain their

independence, participate in social activities, and travel, even as they age. Incontinence and ostomy care products are essential tools that enable them to lead fulfilling lives without constantly worrying about their conditions.

The growing demand from the aging population has spurred innovation in the design and functionality of incontinence and ostomy care products. Manufacturers have developed more discreet, comfortable, and user-friendly options, allowing elderly individuals to manage their conditions with greater ease and comfort.

The aging population has played a crucial role in raising awareness and reducing the stigma associated with incontinence and ostomy conditions. As more individuals openly discuss and address these concerns, the market expands to meet the growing need.

Rising Incidence of Chronic Diseases

Chronic diseases, which include conditions such as diabetes, colorectal cancer, and irritable bowel syndrome, have been on the rise globally. As this health challenge becomes increasingly prevalent, it is not only straining healthcare systems but also stimulating the growth of the global incontinence and ostomy care products market. In 2021, non-communicable diseases (NCDs) claimed the lives of 18 million individuals under the age of 70, with 82% of these premature deaths occurring in low- and middle-income countries. Overall, 73% of all NCD-related deaths were concentrated in these regions. Cardiovascular diseases were the leading cause, accounting for over 19 million fatalities, followed by cancers at 10 million, chronic respiratory diseases at 4 million, and diabetes, including kidney disease deaths linked to diabetes, at over 2 million. These figures underscore the disproportionate burden of NCDs on lower-income countries and highlight the urgent need for targeted interventions.

Chronic diseases often bring a higher risk of developing incontinence. For example, individuals with diabetes may experience diabetic neuropathy, which can lead to bladder control problems. Similarly, those with certain forms of cancer or gastrointestinal conditions may undergo treatments that result in incontinence. The elevated risk of incontinence has led to a heightened demand for products such as adult diapers, undergarments, and pads.

Chronic diseases can necessitate ostomy surgeries, a procedure in which an artificial opening is created for the elimination of waste, typically due to a diseased or damaged bowel. Conditions like colorectal cancer and inflammatory bowel diseases frequently lead to the need for ostomy bags. The rising incidence of these diseases directly

correlates with a growing requirement for ostomy care products, driving market growth.

Chronic diseases often require prolonged medical management, which may extend to years or even a lifetime. This extended care duration results in a consistent demand for incontinence and ostomy care products. As patients manage their conditions, they rely on these products to maintain their quality of life and independence.

Chronic diseases can significantly impact an individual's lifestyle. While medical interventions may help manage these conditions, individuals often need to adapt their lives to accommodate these diseases. Incontinence and ostomy care products play a crucial role in enabling patients to continue leading active lives and participating in social activities, mitigating the lifestyle impact of their illnesses.

The increase in the incidence of chronic diseases has led to greater awareness and acceptance of these conditions within society. Patients and healthcare professionals are more open to discussing incontinence and ostomy care, reducing the stigma associated with these conditions. This cultural shift has contributed to a greater willingness to seek appropriate products and care, thereby boosting the market.

The growing demand for incontinence and ostomy care products has driven innovation in product technology. Manufacturers are developing products that are not only more effective but also more discreet, comfortable, and user-friendly. These innovations cater to the evolving needs of individuals with chronic diseases, further driving market growth.

The expansion of healthcare infrastructure and improved access to medical services has enhanced the availability of incontinence and ostomy care products. Patients now have more opportunities to access these essential products, fostering market growth.

Growing Awareness and Education

Awareness and education have the power to transform lives, particularly for individuals who face the challenges of incontinence and ostomy-related conditions. In recent years, there has been a significant shift towards disseminating knowledge and reducing stigma around these issues, consequently contributing to the growth of the global incontinence and ostomy care products market.

Historically, incontinence and ostomy-related conditions were often surrounded by stigma, secrecy, and shame. However, with the advent of educational initiatives and awareness campaigns, individuals who previously suffered in silence are now more

inclined to seek help. This shift has resulted in a more open and accepting attitude towards incontinence and ostomy, effectively expanding the market as more people access these products.

Awareness and education efforts highlight the importance of early intervention for incontinence and ostomy care. By educating individuals about the benefits of early diagnosis and appropriate management, more people are taking action at the onset of symptoms. Consequently, the demand for incontinence and ostomy care products has increased as a result of early and proactive healthcare seeking behavior.

Education empowers individuals to manage their conditions effectively. Patients who understand the range of available products and how to use them are better equipped to live life with confidence and comfort. As patients become more informed about their options, they increasingly rely on incontinence and ostomy care products to maintain their quality of life, thus driving market growth.

Awareness and education efforts not only reach the individuals facing these conditions but also inform healthcare professionals. This leads to more healthcare providers offering recommendations and prescribing incontinence and ostomy care products as part of a holistic care plan. The increased endorsement of these products further bolsters market growth.

The emphasis on awareness and education has pushed manufacturers to innovate and develop better incontinence and ostomy care products. These innovations include products that are more discreet, comfortable, and user-friendly, catering to the needs and preferences of a more informed and discerning consumer base.

Advocacy groups and non-profit organizations focused on incontinence and ostomy care have played a significant role in expanding awareness and education. They provide resources, support, and information to both patients and healthcare professionals. As these organizations grow in influence and reach, more people are connected with the information they need, which, in turn, stimulates the demand for incontinence and ostomy care products.

Awareness and education have contributed to a shift in cultural acceptance and understanding of incontinence and ostomy-related conditions. As societal perceptions change, individuals are more likely to discuss their challenges openly and seek the necessary products to improve their quality of life.

Changing Lifestyles and Dietary Habits

The global landscape is continuously evolving, and with it, our lifestyles and dietary habits. Over a 25-year period, 11% of the population maintained all five lifestyle factors without making any changes. Meanwhile, 29.2% modified one factor, 32.6% adjusted two, 19.8% altered three, 6.5% changed four, and only 0.9% modified all five lifestyle factors. These statistics highlight varying levels of lifestyle adaptation over time. These changes have brought about a significant impact on the incidence of incontinence and the necessity for ostomy care. As modern lifestyles become increasingly fast-paced, the global market for incontinence and ostomy care products is experiencing notable growth.

Modern dietary habits often include high consumption of processed foods, excess sugar, and caffeine. These dietary choices can lead to gastrointestinal problems, such as irritable bowel syndrome and constipation, which may result in incontinence issues. An increasing number of individuals are seeking incontinence products to manage these challenges and maintain their quality of life.

Modern lifestyles are often characterized by long working hours, stressful routines, and a lack of breaks. The stress and pressure of these lifestyles can lead to a variety of health issues, including urinary incontinence. Data collected from adults aged 15 and older across 16 countries in the Eastern Mediterranean Region reveal the highest prevalence of overweight individuals in Kuwait, Egypt, the United Arab Emirates, Saudi Arabia, Jordan, and Bahrain. Among women, the prevalence of overweight and obesity ranges from 74% to 86%, while for men, it ranges from 69% to 77%. These figures underscore the significant public health challenge posed by obesity in these nations. Many individuals who experience incontinence due to stress or lifestyle-related factors turn to incontinence care products to address their needs.

Modern lifestyles prioritize convenience and portability. Incontinence and ostomy care products have adapted to meet these requirements. Manufacturers have developed discreet and portable products, allowing individuals to manage their conditions effectively while on the go, catering to the demands of busy lifestyles.

Today's older generation is more active and engaged than ever before. Many retirees embark on journeys, vacations, and activities, even as they age. Incontinence and ostomy care products have become essential tools that enable them to maintain their active lives and travel without being hindered by their conditions.

Advancements in product design have led to more discreet, comfortable, and user-friendly incontinence and ostomy care products. These innovations appeal to individuals who are accustomed to modern lifestyles and have specific preferences, further driving the market.

Changing lifestyles are often accompanied by evolving cultural norms. Society is becoming more open and accepting of discussions about incontinence and ostomy care. As the stigma surrounding these conditions decreases, more individuals are willing to seek out products to enhance their quality of life.

In the digital age, information is readily accessible. Individuals can easily educate themselves about their conditions, available products, and coping strategies. This access to information fosters the demand for incontinence and ostomy care products, as individuals become aware of the options available to them.

Key Market Challenges

Stigma and Awareness

Despite the progress made in raising awareness about incontinence and ostomy care, there remains a considerable stigma surrounding these conditions. Many individuals are reluctant to discuss or seek help for these issues, which can hinder market growth. Overcoming this stigma and normalizing discussions about incontinence and ostomy is an ongoing challenge.

Sustainable Product Disposal

The use of disposable incontinence products has raised concerns about their environmental impact. The challenge lies in developing more sustainable product options and educating users about proper disposal methods. Balancing the needs of users with environmental concerns is an ongoing challenge for the industry.

Psychological and Emotional Support

Dealing with incontinence or ostomy can take a significant emotional toll on individuals. Providing adequate psychological and emotional support is a challenge, as these conditions can affect a person's mental well-being and quality of life. Integrating such support into care plans remains an ongoing challenge.

Key Market Trends

Advanced Product Innovations

Innovation in product design and materials is a constant driving force in this market. Expect to see even more advanced incontinence and ostomy care products, with features such as improved absorption, breathability, and discreetness. Manufacturers will continue to invest in research and development to meet the diverse and evolving needs of users.

Sustainable and Eco-friendly Solutions

Environmental consciousness is seeping into the incontinence and ostomy care market. As consumers become more environmentally aware, there is an increasing demand for sustainable and eco-friendly products. Manufacturers are exploring biodegradable materials and greener disposal options to meet this growing trend.

Expanding Market in Emerging Economies

The global market for incontinence and ostomy care products is expanding into emerging economies. As these nations experience economic growth and improved healthcare infrastructure, there is a growing demand for these products. Manufacturers are keen on tapping into these new markets.

Segmental Insights

Type Insights

Based on the Category of type, incontinence care products segment dominate the Global Incontinence And Ostomy Care Products Market. The increasing global prevalence of urinary and fecal incontinence, particularly among aging populations, is a major driver for this segment. Conditions such as age-related bladder dysfunction, neurological disorders, and post-surgical complications contribute to the rising demand for incontinence care products. As these issues are prevalent among both elderly individuals and younger patients with chronic conditions, the market for these products has expanded significantly. The incontinence care segment offers a diverse range of products, including adult diapers, absorbent pads, liners, and protective underwear. These products cater to varying levels of incontinence severity, providing tailored solutions for different patient needs. This versatility ensures the segment can address a

broader customer base, including individuals requiring light, moderate, or heavy incontinence management.

Continuous innovation in incontinence care products has further solidified the segment's market dominance. Manufacturers are focusing on improving comfort, discretion, and absorbency to meet consumer preferences. Features such as breathable materials, odor control, and advanced absorption technologies have enhanced user experience and expanded the appeal of these products to a wider audience, including younger, active individuals. Increased awareness of incontinence management options, combined with growing accessibility to these products, particularly in developing regions, has bolstered demand. Public health campaigns and educational initiatives have played a critical role in reducing stigma around incontinence, encouraging individuals to seek effective solutions and driving market growth for incontinence care products.

Regional Insights

In 2024, the North America market asserted its dominance in the incontinence and ostomy care products industry by securing the largest share of revenue. North America boasts one of the most advanced healthcare systems globally, facilitating widespread access to high-quality incontinence and ostomy care products. Hospitals, nursing homes, and long-term care facilities in the region are well-equipped to provide these products to patients, ensuring consistent demand from institutional buyers. Furthermore, robust distribution networks ensure product availability across urban and rural areas.

North America has a high prevalence of chronic conditions such as colorectal cancer, bladder disorders, diabetes, and inflammatory bowel diseases. These conditions often necessitate the use of incontinence and ostomy care products, driving demand across the region. For instance, the American Cancer Society reports that colorectal cancer is one of the most commonly diagnosed cancers in the U.S., contributing to the widespread use of ostomy products. Consumers in North America exhibit high levels of awareness regarding incontinence and ostomy management solutions. Public health campaigns, education initiatives, and strong advocacy from patient support groups have reduced the stigma associated with these conditions, encouraging individuals to seek effective solutions. This heightened awareness drives adoption rates and fosters brand loyalty in the region. North America leads the way in innovation within the incontinence and ostomy care market. Companies in the region continually develop advanced products featuring cutting-edge technologies, such as skin-friendly adhesives, improved absorbent materials, and smart sensors. These innovations enhance comfort, usability,

and effectiveness, meeting consumer demand for high-performance solutions. Key Market Players

Coloplast A/S

Essity AB

Kimberly-Clark Corp

B Braun SE

Hollister Inc

Unicharm Corp

ConvaTec Group PLC

Welland Medical Ltd

Domtar Corp

Salts Healthcare Ltd

Report Scope:

In this report, the Global Incontinence And Ostomy Care Products Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Incontinence And Ostomy Care Products Market, By Type:

Incontinence Care Products

Absorbents

Incontinence Bags

Others

Ostomy Care Products

Ostomy Bags

Deodorants

Skin Barriers

Irrigation Products

Incontinence And Ostomy Care Products Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Incontinence And Ostomy Care Products Market.

Available Customizations:

Global Incontinence And Ostomy Care Products market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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