

Incontinence And Ostomy Care Products Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 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

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

Date: January 2024

Pages: 178

Price: US\$ 4,900.00 (Single User License)

ID: IB2E7AB539E5EN

Abstracts

Global Incontinence And Ostomy Care Products Market was valued at USD 16.94 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.90% through 2028. 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. 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. 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.

The sheer size of the aging population is a significant factor driving the growth of this market. The United Nations projects that by 2050, one in six people globally will be over the age of 65. With such a substantial elderly population, the demand for incontinence and ostomy care products is expected to continue its upward trajectory.

Today's seniors are more active and engaged than ever before. 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.

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. 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. 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

In the realm of incontinence care products, the year 2022 saw the dominance of this market segment, contributing the largest share of revenue. Forecasts for the period from 2024 to 2028 predict it to be the fastest-growing segment. Within this domain, the adsorbents category held a substantial market share in 2022. This was primarily attributed to the heightened usage rates, the surging popularity of disposable adult diapers, the expanding elderly population, and the increasing prevalence of bladder-related conditions, including cystitis, urinary incontinence, and overactive bladder. Additionally, the introduction of innovative and tailored products aimed at enhancing user-friendliness and comfort, along with a gradual reduction in the social stigma surrounding items like adult diapers, provide a strong rationale for the segment's growth in the forecasted period. For example, in May 2023, Nobel Hygiene Pvt Ltd's brand, Friends Adult Diapers, introduced UltraThinZ, a slim disposable diaper designed for individuals experiencing mild incontinence, with distinct options for both men and women.

Conversely, the ostomy care segment encompasses a wide array of products, such as ostomy bags, deodorants, skin barriers, and irrigation products. In 2022, ostomy bags were the dominant category within the ostomy care products segment. The heightened prevalence of conditions like Crohn's disease, colorectal cancer, and Inflammatory Bowel Disease (IBD), along with an increased number of colostomy surgeries and rising awareness levels among patients, are anticipated to propel the growth of this segment.

According to the CROHN'S & COLITIS FOUNDATION, approximately 1 in every 100 individuals in the United States is diagnosed with IBD. Furthermore, the introduction of user-friendly and skin-friendly ostomy bags is projected to stimulate market growth for incontinence and ostomy care products. For instance, in June 2021, Welland Medical Limited unveiled their new line of ostomy pouches, known as Aurum Plus, which offer comfort, softness, and water resistance. Ostomy bags can be further categorized into colostomy, ileostomy, and urostomy bags. The colostomy bags sub-segment has experienced notable growth due to the increasing elderly population and a high prevalence of colorectal cancer.

Regional Insights

In 2022, the European market asserted its dominance in the incontinence and ostomy care products industry by securing the largest share of revenue. This was fueled by various factors, including the increasing number of stoma patients resulting from conditions such as Crohn's disease, ulcerative colitis, and IBD, which are expected to continue propelling the European market throughout the forecasted period. Europe is

home to approximately 731,000 individuals living with an ostomy, and research published in the Journal of Crohn's and Colitis indicates a consistent rise in the incidence of ulcerative colitis and Crohn's disease across the continent. Furthermore, a September 2021 article from Crohn's & Colitis reported that over 500,000 people in the UK are living with IBD. Hence, the growing prevalence of IBD, the increasing adoption of sedentary lifestyles, and the introduction of technologically advanced products stand as the primary drivers of market growth in Europe.

Conversely, the Asia Pacific region is anticipated to exhibit the swiftest CAGR in the incontinence and ostomy care products market throughout the forecast period. This growth is attributed to a significant portion of the population in this region grappling with incontinence, urinary problems, and bladder issues due to unhealthy lifestyle choices. For instance, as reported by the Continence Foundation of Australia in May 2023, one in four adult Australians is affected by incontinence. Additionally, numerous nursing centers in the Asia Pacific region organize various programs, including motivational initiatives and educational seminars, aimed at raising awareness among ostomy patients. The Asia and South Pacific Ostomy Association (ASPOA) also celebrates World Ostomy Day annually, directing attention from both the general public and the global community to enhance the rehabilitation and aspirations of ostomates. Consequently, the growth in consumer awareness is expected to fuel the demand for incontinence and ostomy care products in this region.

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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