

North America Urinary Tract Infection Testing Market By Type (Urethritis, Cystitis, Pyelonephritis), By Product (Instruments, Consumables), By End-use (General Practitioners, Urologists, Urogynecologists, Hospital Laboratories, Reference Laboratories, Hospital Emergency Departments, Urgent Care, Others), By Country, By Competition Forecast & Opportunities, 2019-2029F

<https://marketpublishers.com/r/NAD61922F40EEN.html>

Date: June 2024

Pages: 132

Price: US\$ 4,400.00 (Single User License)

ID: NAD61922F40EEN

Abstracts

North America Urinary Tract Infection Testing Market was valued at USD 200.34 million in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.63% through 2029. The growth of the market in the region is being propelled by several significant factors, including the rising incidence of Urinary Tract Infections (UTIs), the aging demographic, heightened awareness regarding the importance of early UTI detection, and improved accessibility to healthcare facilities. Furthermore, engaging in sexual activity and the use of spermicides and diaphragms can elevate the risk of UTI development. Additionally, frequent pelvic examinations and anatomical irregularities in the urinary tract can also increase an individual's susceptibility to UTIs. Urinary tract infections have become a prevalent global concern. According to data presented by the National Library of Medicine, UTIs are frequently occurring bacterial infections, especially among women in the United States, with a higher incidence observed in individuals between the ages of 16 and 35. Approximately 10% of women experience UTIs annually, and 40-60% will encounter at least one infection during their lifetime. Repeated occurrences are common, with nearly half of affected women experiencing a second infection within a year. Notably, UTIs are more prevalent in females, occurring at a rate at least four times higher than in males. Moreover, even

with appropriate antibiotic treatment, UTI symptoms can persist for several days, potentially negatively impacting the quality of life for women with recurrent UTIs. In fact, approximately 25% of women face such recurrences within a span of six months.

Key Market Drivers

High Prevalence of UTIs

Urinary Tract Infections (UTIs) are one of the most prevalent bacterial infections globally, affecting millions of individuals each year. In North America, this common ailment has taken center stage in the healthcare industry, with the high prevalence of UTIs acting as a significant catalyst for the growth of the Urinary Tract Infection Testing Market. The sheer scale of UTIs in North America cannot be underestimated. These infections affect individuals of all ages and genders, although they are notably more common among women. According to the National Institute of Diabetes and Digestive and Kidney Diseases, one in five women in the United States will experience a UTI during their lifetime. The prevalence is even higher among the elderly, with approximately 20-30% of women aged 65 and older experiencing recurring UTIs. Such staggering numbers create a constant and substantial demand for UTI diagnostic tests. The high prevalence of UTIs has led to a noticeable increase in healthcare utilization. Patients experiencing UTI symptoms are more likely to seek medical attention promptly. This inclination towards seeking healthcare services at the onset of symptoms has boosted the demand for diagnostic tests. Healthcare providers are increasingly focusing on early detection and treatment, as untreated UTIs can lead to severe complications, including kidney infections. The aging population in North America has further amplified the UTI Testing Market. Elderly individuals are particularly vulnerable to UTIs due to weakened immune systems, reduced bladder function, and other age-related factors. As the elderly demographic continues to expand, so does the need for UTI testing. This segment of the population often requires ongoing monitoring and testing to manage recurrent UTIs effectively. To meet the demand created by the high prevalence of UTIs, the healthcare industry has seen significant advancements in diagnostic technologies. Traditional methods like urinalysis and urine cultures remain essential but have been complemented by newer, more accurate, and rapid diagnostic tools. Molecular diagnostics, for instance, provide quick and reliable results, allowing healthcare professionals to make timely treatment decisions. The rise of preventive care initiatives and telehealth services has improved access to healthcare and diagnostic testing. Patients can now easily connect with healthcare providers, receive timely advice, and access UTI testing options

conveniently. Telehealth consultations have played a crucial role in diagnosing UTIs early, especially during the ongoing global health challenges.

Point-of-Care Testing (POCT)

In the dynamic landscape of healthcare, Point-of-Care Testing (POCT) has emerged as a game-changer, providing rapid and convenient diagnostic solutions. One area where POCT is making a significant impact is in the North American urinary Tract Infection (UTI) Testing Market. One of the most compelling advantages of POCT in the UTI testing market is the ability to provide rapid results. Traditional laboratory-based UTI testing methods, such as urine cultures, can take hours to days to yield results. In contrast, POCT devices can deliver results within minutes, enabling healthcare providers to make immediate treatment decisions. This speed is critical for UTI management, as timely intervention can prevent the infection from worsening and causing complications. POCT devices are designed with patient comfort and convenience in mind. Patients no longer need to wait anxiously for lab results to arrive; instead, they can receive on-the-spot testing and consultation during their healthcare appointments. This convenience encourages patients to seek medical attention promptly when they suspect a UTI, contributing to early diagnosis and intervention. The use of POCT in UTI testing can help alleviate the burden on healthcare facilities and laboratories. Since testing is performed at the point of care, there is no need to send samples to external labs, reducing turnaround time and resource utilization. This is especially beneficial in high-demand healthcare settings, where quick diagnosis and treatment are paramount. POCT devices are portable and often require minimal infrastructure, making them well-suited for remote and underserved areas. In North America, where access to healthcare can be challenging in rural or remote regions, POCT for UTI testing can extend diagnostic capabilities to areas with limited laboratory facilities. This not only improves healthcare equity but also contributes to early UTI diagnosis and management. Early UTI diagnosis and treatment are crucial for preventing complications and reducing overall healthcare costs. Untreated or recurrent UTIs can lead to kidney infections and other serious health issues, resulting in extended hospital stays and higher treatment expenses. By facilitating early intervention, POCT helps mitigate these risks and financial burdens. POCT devices streamline the diagnostic process, making healthcare delivery more efficient. Healthcare providers can promptly assess UTIs, prescribe appropriate antibiotics, and monitor treatment effectiveness. This efficiency leads to better patient care, reduced hospital admissions, and improved healthcare system performance.

Increasing Awareness and Healthcare Access

The North America Urinary Tract Infection (UTI) Testing Market has been on a steady growth trajectory, and two key factors are significantly contributing to this upward trend: increasing awareness about UTIs and improved healthcare access. As awareness campaigns and educational efforts gain momentum, people across North America are becoming more informed about urinary tract infections. These campaigns highlight the signs, symptoms, and risks associated with UTIs, leading to a greater recognition of the importance of early diagnosis and treatment.

(a) **Symptom Recognition:** An essential aspect of UTI awareness is the recognition of symptoms. People are now more likely to seek medical attention when they experience classic UTI symptoms like frequent urination, burning sensation, and lower abdominal discomfort. This increased vigilance drives demand for UTI testing.

(b) **Complications Prevention:** Awareness initiatives emphasize the potential complications of untreated UTIs, such as kidney infections. This knowledge encourages individuals to take UTIs seriously and seek medical evaluation promptly, further contributing to market growth.

Access to healthcare services plays a pivotal role in driving the growth of the UTI Testing Market in North America. Several factors have improved healthcare access, making it easier for individuals to obtain timely UTI testing and treatment.

(a) **Telehealth Services:** The advent of telehealth services has been a game-changer. Patients can now consult with healthcare providers remotely, receive advice on UTI symptoms, and even order UTI tests for at-home use. This convenient access to medical expertise has increased UTI testing rates.

(b) **Urgent Care and Retail Clinics:** The proliferation of urgent care centers and retail clinics has made healthcare more accessible. These facilities often offer UTI testing services on a walk-in basis, reducing the barriers to diagnosis and treatment.

(c) **Pharmacies and Over-the-Counter Tests:** Pharmacies now stock over-the-counter UTI test kits. This accessibility allows individuals to perform UTI tests in the comfort of their homes and seek medical attention if necessary, promoting early diagnosis.

(d) **Health Insurance Coverage:** Expanding health insurance coverage and improved reimbursement policies have made it more affordable for patients to seek UTI testing and treatment, reducing financial barriers. The increased awareness of UTIs has also prompted individuals to adopt preventive healthcare practices. Patients are more likely to take steps to reduce their risk of UTIs, such as staying hydrated, practicing good hygiene, and seeking prompt treatment for suspected infections. These preventive measures contribute to reducing the overall UTI burden and the need for testing and treatment.

Non-Invasive Testing Options

The North America Urinary Tract Infection (UTI) Testing Market has witnessed remarkable growth in recent years, largely propelled by innovations in non-invasive testing options. These technologies have revolutionized the diagnosis and management of UTIs, offering patients and healthcare providers more comfortable and efficient solutions. Non-invasive UTI testing options have transformed the patient experience by eliminating discomfort and reducing anxiety associated with traditional testing methods, such as catheterization or urethral swabs. For patients, the prospect of undergoing non-invasive tests is far more appealing, resulting in higher patient compliance with recommended diagnostic procedures. The availability of non-invasive UTI testing kits for home use has empowered individuals to take control of their health. These kits typically include urine test strips or devices that allow users to analyze their urine for signs of infection. Patients can then share the results with healthcare providers for further guidance, enhancing convenience and early detection. Point-of-care (POC) dipstick tests, which are non-invasive and can be performed at the healthcare provider's office, have gained popularity. These tests involve dipping a specialized strip into a urine sample to detect signs of infection. The rapid results enable immediate diagnosis and treatment decisions, minimizing the need for laboratory-based testing and reducing patient wait times. Molecular diagnostic methods, such as polymerase chain reaction (PCR) and nucleic acid amplification tests (NAATs), have significantly improved the accuracy and speed of UTI diagnosis. These tests require only a urine sample, eliminating the need for invasive procedures like catheterization. Molecular diagnostics can detect the presence of UTI-causing bacteria and their resistance to antibiotics, enabling tailored treatment plans. Non-invasive testing options contribute to early UTI diagnosis, reducing the risk of complications. Untreated or recurrent UTIs can lead to kidney infections and other severe health issues, resulting in extended hospital stays and higher treatment expenses. Non-invasive methods help mitigate these risks, improve patient outcomes, and reduce healthcare costs. The availability of non-invasive UTI testing options encourages patients to become more engaged in their healthcare. Patients are more likely to seek prompt testing when they experience symptoms, and the convenience of non-invasive methods makes it easier for them to comply with recommended testing protocols. This active participation contributes to early diagnosis and treatment.

Key Market Challenges

Antibiotic Resistance

A significant challenge facing the UTI Testing Market is the emergence of antibiotic

resistant UTIs. Overuse and misuse of antibiotics have led to the development of resistant strains of bacteria, making it more challenging to treat UTIs effectively. This poses a dilemma for healthcare providers who must balance the need for early antibiotic treatment with the risk of exacerbating antibiotic resistance.

Cost Pressures

Cost remains a critical concern for both patients and healthcare providers. While UTI testing is essential for diagnosis and treatment, the associated expenses can be a barrier for some individuals. Health insurance coverage varies, and not all plans fully reimburse the costs of diagnostic tests, especially for recurrent UTIs. This cost disparity can hinder access to testing and treatment.

Healthcare Disparities

Disparities in healthcare access and quality persist in North America. Certain marginalized populations, including those in rural or underserved areas, may face challenges in accessing UTI testing and treatment. Addressing these disparities requires concerted efforts to improve healthcare infrastructure and reduce barriers to care.

False Positives and Negatives

No diagnostic test is perfect, and UTI testing is no exception. False positives and false negatives can occur, leading to unnecessary treatments or missed infections, respectively. Improving the accuracy of UTI tests and reducing the occurrence of false results is an ongoing challenge for the industry.

Key Market Trends

Point-of-Care Testing (POCT) Dominance

Point-of-Care Testing (POCT) devices are set to play an even more significant role in the UTI Testing Market. These portable and rapid diagnostic tools provide on-the-spot results, reducing the turnaround time for diagnosis and treatment. As technology continues to improve, we can expect more accurate and user-friendly POCT devices, making UTI testing even more accessible and efficient.

Artificial Intelligence (AI) and Machine Learning Integration

AI and machine learning technologies are poised to revolutionize UTI diagnosis and management. These tools can analyze vast amounts of patient data, including symptoms, medical history, and test results, to assist healthcare providers in making more accurate and personalized treatment decisions. AI algorithms can also help predict UTI outbreaks and antibiotic resistance patterns, contributing to more effective interventions.

Personalized Medicine

Personalized medicine is gaining traction in UTI diagnosis and treatment. Genetic testing and molecular diagnostics can help identify specific strains of bacteria responsible for UTIs and their antibiotic resistance profiles. This information allows healthcare providers to tailor treatment plans, prescribing the most effective antibiotics while minimizing the risk of antibiotic resistance.

Smart Healthcare Devices

The integration of smart healthcare devices into UTI testing is on the horizon. Wearable sensors and IoT (Internet of Things) technologies can continuously monitor relevant health parameters and detect early signs of UTIs. These devices offer real-time data to both patients and healthcare providers, enabling proactive interventions.

Segmental Insights

Type Insights

Based on the category of Type, the cystitis segment dominated the revenue share in the North American urinary tract infection testing market. Cystitis, a condition characterized by the entry of bacteria from the skin or bowel into the urethra and bladder, causing irritation and inflammation of the bladder lining, leading to a bladder infection, played a pivotal role in this dominance. Cystitis can manifest as either acute, occurring suddenly, or interstitial, which is a chronic and long-term condition. The growth of this segment can be attributed to several factors, including the increasing incidence and recurrence rate of cystitis, a higher number of product approvals, and a substantial population of diabetes patients who are more susceptible to cystitis.

Looking ahead, the pyelonephritis segment is anticipated to experience the fastest CAGR during the forecast period. This growth is primarily driven by the rising number of

pyelonephritis cases in the region. According to statistics from the National Center for Biotechnology Information (NCBI), there are approximately 250,000 cases of pyelonephritis reported in the U.S. each year, with a higher prevalence among females. Specifically, among women aged 18 to 49 years, the estimated incidence of pyelonephritis is 28 cases per 10,000 individuals, and approximately 7% of these cases necessitate hospitalization. Recurrence is less common compared to uncomplicated urinary tract infections, with 9% of females and 5.7% of males experiencing a second episode within a year.

Product Insights

The instruments category secured the largest share of revenue in 2023 and is poised to experience the most rapid CAGR throughout the projected timeframe. The North American region's escalating prevalence of urinary tract infections (UTIs) has led to a heightened demand for effective and dependable testing methodologies. Instruments play a pivotal role in UTI diagnostics as they are indispensable for precise and swift identification. Advanced diagnostic instruments, including automated urine analyzers and point-of-care testing devices, have garnered considerable attention due to their capacity to provide quicker and more precise outcomes. These instruments facilitate the early detection of UTIs, enabling timely treatment and enhancing patient outcomes.

Ongoing advancements in diagnostic technologies have resulted in the creation of sophisticated instruments with enhanced capabilities. For example, the increasing adoption of innovative UTI testing equipment, such as the Illumina Urinary Pathogen Infectious Disease/Antimicrobial Resistance (ID/AMR) Panel (UPIP), is bringing about a transformation in the UTI testing market within the region. These advanced instruments offer superior accuracy and sensitivity, drawing the interest of healthcare providers and propelling market expansion.

Country Insights

In 2023, the United States asserted its dominance in the North American urinary tract infection testing market, capturing a substantial 90.47% of the revenue share. This commanding position can be attributed to the significant presence of industry giants like Abbott, BIOMERIEUX, BD, Siemens Healthineers AG, QIAGEN, Accelerate Diagnostics, Inc., Bio-Rad Laboratories, Inc., and Quest Diagnostics, all of which are exerting a positive influence on market expansion. Furthermore, the country is witnessing an upswing in research and development initiatives spearheaded by these

key players, which is expected to further propel market growth.

For example, in June 2023, Pathnostics, a U.S.-based precision diagnostic testing and development company, introduced two new studies showcasing the promising outcomes of its advanced urinary tract infection (UTI) test. These studies demonstrated that treatment guided by Pathnostics' Guidance UTI test resulted in reduced healthcare resource utilization and costs compared to conventional urine culture (SUC) tests.

Conversely, Canada is anticipated to experience the swiftest growth rate in the forthcoming years. This is primarily due to the increasing awareness about UTI management among the Canadian population and the proactive efforts of regional government authorities. For instance, in December 2019, the Canadian government introduced the Urinary Tract Infection (UTI) program to address the issue of excessive antibiotic use in long-term care homes (LTCHs) for suspected UTIs and the associated risks linked to antibiotic overuse.

The UTI program aims to assist long-term care homes in improving UTI management for residents without catheters, guiding them in implementing necessary organizational and individual practice enhancements. The ultimate goal of the program is to optimize UTI testing and treatment protocols, promoting superior healthcare outcomes while minimizing complications related to antibiotic usage.

Key Market Players

• QIAGEN N.V.

• Accelerate Diagnostics Inc

• Bio-Rad Laboratories Inc

• Hoffmann-La Roche Ltd

• Danaher Corp

• Siemens Medical Solutions USA, Inc.

• Randox Laboratories Ltd

• ThermFisher Scientific Inc.

North America

T2 Biosystems, Inc.

Report Scope:

In this report, the North America Urinary Tract Infection Testing Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

North America Urinary Tract Infection Testing Market, By Type:

Urethritis

Cystitis

Pyelonephritis

North America Urinary Tract Infection Testing Market, By Product:

Instruments

Consumables

North America Urinary Tract Infection Testing Market, By End-use:

General Practitioners

Urologists

Urogynecologists

Hospital Laboratories

Reference Laboratories

Hospital Emergency Departments

Urgent Care

Others

North America Urinary Tract Infection Testing Market, By Country:

United States

Canada

Mexico

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the North America Urinary Tract Infection Testing Market.

Available Customizations:

North America Urinary Tract Infection Testing 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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