

Europe Incontinence Devices and Ostomy Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 90 pages | Mordor Intelligence

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Report description:

The European incontinence devices and ostomy market are expected to register a CAGR of 10.1% during the forecast period.

COVID-19 had a significant impact on the growth of the market. This was due to the halt of visits to healthcare centers such as clinics and hospitals and the unavailability of proper treatment procedures. For instance, the research study published in Springer in March 2022 mentioned that, overall, a 19.5% reduction in ostomy closure occurred between March 2020 and February 2021. In such circumstances, patient care was delivered through telemedicine services in Europe. Additionally, in a research article published in Springer in August 2020 in Southern Italy, a telemedicine-based pathway was developed for emergency care outpatients with a colostomy as a response to the postponements of patient visits. Such delays in outpatient visits led to a short-term decline in the demand for incontinence and ostomy devices. However, the relaxation of the strict regulations in Europe led to the reopening of healthcare centers and an increase in patient inflow, thereby driving the demand for incontinence devices and ostomies and boosting the growth of the market over the forecast period.

Factors driving market growth include the rising geriatric and obese populations, the increasing prevalence of renal diseases and nephrological injuries, and the growing awareness and acceptance of ostomy care products.

According to a United Nations report published in 2022, by 2050, one in every four people in Europe will be 65 or older. Similarly, Italy has approximately 23.6% of its population aged 65 and older, according to the United Nations Population Fund's World Population Dashboard Statistics 2021. As the geriatric population becomes more vulnerable to kidney disorders, the demand for incontinence devices and ostomies is expected to rise, which is expected to contribute to the growth of the market studied. Additionally, the prevalence of renal disorders among the European population is expected to contribute to the growth of the market. As per the Lancet article published in June 2022, one in ten adults in Europe is likely to have chronic kidney disease.

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Similarly, as per the European Kidney Alliance report published in 2021, a staggering 75 million people suffer from chronic kidney disease in Europe. Such prevalence of chronic kidney disorders among the European population is expected to contribute to rising demand for Incontinence and ostomy devices in Europe, which is poised to drive market growth over the forecast period.

Thus, the aforementioned factors are expected to drive the growth of the market over the forecast period. However, the lack of proper reimbursement and complications associated with ostomy devices, and the usage of incontinence products are expected to restrain the growth of the market.

Europe Incontinence Devices & Ostomy Market Trends

Colorectal Cancer is Expected to Hold a Significant Share in the Growth of the Market Over the Forecast Period

Colorectal cancer is expected to dominate the market over the forecast period. The growth of the studied segment is attributable to the rising prevalence of colorectal cancer and the increasing demand for effective treatment procedures.

According to the article published in BMJ in April 2021, 43% of the participants from over 18 centers in Spain were diagnosed with a tumor in the rectosigmoid junction/rectum. The report also mentioned that nearly 64% of the participants in the study were diagnosed with advanced-stage colorectal cancer. Thus, the high incidence of colorectal cancer is expected to drive the demand for incontinence devices, thereby contributing to the growth of the studied segment. Also, the usage of incontinence products in the treatment procedures of colorectal cancer is expected to contribute to the segment's growth. As per the article published by Medline Plus in April 2022, external incontinence products are available to protect the skin from constant leakage of stool or urine. Also, in the article published by the NHS in March 2021, incontinence products such as anal plugs and disposable pads can be used until the symptoms can be controlled. Such uses of incontinence devices in treating colorectal cancer would contribute to the segment's growth during the forecast period.

United Kingdom is Expected to Hold Significant Share in the Market Over the Forecast Period

The United Kingdom is expected to dominate the market over the forecast period due to the increasing prevalence of renal diseases and kidney injuries and the rising geriatric population.

The Health Foundation Report, updated in December 2021, shows that, in the next 25 years, the number of people older than 85 will double to 2.6 million in the United Kingdom. Additionally, as per the Overview of the UK Population: January 2021 data updated by the Government of the United Kingdom, it was estimated that there would be an additional 7.5 million people aged 65 and over in the United Kingdom in 50 years. Such a rising geriatric population is expected to contribute to the growth of the market studied in this country. Also, the prevalence of various kidney disorders is expected to contribute to the growth of the market. According to the Kidney Care 2021 data, around 3.5 million people in the United Kingdom have chronic kidney disease and over 68,000 people in the United Kingdom are being treated for kidney failure. The report also mentioned that every day around 20 people in the United Kingdom would develop kidney failure. Also, according to the ABC UK article published in October 2022, bladder cancer accounts for 4.5% of all new cancer cases in the United Kingdom, with an estimated 20,500 cases diagnosed every year. Such a high prevalence of cancer cases is expected to contribute to the growing demand for incontinence devices, and ostomy devices in the United Kingdom, which is expected to contribute to the growth of the market studied in the United Kingdom.

Europe Incontinence Devices & Ostomy Market Competitor Analysis

The European incontinence devices and ostomy market is highly competitive and consists of a number of major players. Companies like Abena AS, B. Braun Melsungen AG, Coloplast Corporation, ConvaTec, Hollister Inc., Kimberly-Clark Corporation,

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Salts Healthcare, SCA (Svenska Cellulosa Aktiebolaget), and Unicharm Corporation, among others, hold substantial shares in the market.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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