

## **Overactive Bladder Treatment Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

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### **Report description:**

The overactive bladder (OAB) treatment market is expected to register a CAGR of 3.4% over the forecast period (2022-2027).

COVID-19 is expected to have a pronounced impact on the overactive bladder treatment market. This is mainly due to the increasing overactive bladder symptoms in the COVID-19 recovered patients. As per the study titled "Long COVID and COVID-19 Associated Cystitis (CAC)" published in November 2021, patients are reported with de novo or worsening overactive bladder symptoms 10-14 weeks after hospitalization with COVID-19. Additionally, the study titled "COVID-19 inflammation results in urine cytokine elevation and causes COVID-19 associated cystitis (CAC)" published in December 2020 reported that COVID-19 inflammation resulted in urine cytokine elevation, thereby increasing the frequency of urination, which leads to overactive bladder disorder among the patients infected with COVID-19. Thus, the increase in the COVID-19 infection rate associated with overactive bladder symptoms increased the demand for overactive bladder treatments amid the pandemic phase.

Furthermore, the increasing incidence of diseases, such as Parkinson's disease, which leads to overactive bladder disorder, and the rising geriatric population are primary drivers of the global market. For instance, according to the World Population Prospect, globally, in 2022, there were 771 million people aged 65 years or over, and it is projected to reach 994 million by 2030 and 1.6 billion by 2050. Since urinary incontinence generally increases with age, the overactive bladder has a major negative impact on the quality of life and health of the aged population. With the increasing burden of overactive bladder, along with other urinary diseases, the growth of the overactive bladder treatment market is likely to be high.

Other factors, such as developing innovative intravesical therapies and aggressive marketing by pharmaceutical companies, are also expected to expand the market growth. For instance, in April 2021, Urovant Sciences commercially launched GEMTESA, an adrenergic receptor agonist for the treatment of overactive bladder (OAB) with symptoms of urge urinary incontinence (UUI),

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urgency, and urinary frequency in adults.

Furthermore, the strategic initiatives taken by the market players are also driving the growth of the market. For instance, in August 2021, Merz Therapeutics and the Israeli start-up Vensica Therapeutics Ltd. entered into a strategic license and collaboration agreement for the delivery of botulinum neurotoxin A (Xeomin) to the bladder wall by using Vensica's innovative ultrasound-assisted delivery catheter. Through this agreement, Merz Therapeutics became the exclusive toxin supplier of any needleless application for urological indications, such as overactive bladder, neurogenic bladder, interstitial cystitis, and other urological indications.

Thus, owing to the abovementioned factors, the market is expected to project growth over the forecast period. However, the side effects of the current treatment may impede the growth of the market.

#### Overactive Bladder Treatment Market Trends

##### Neurostimulation Segment is Expected to Hold a Major Share in the Overactive Bladder Treatment Market

The neurostimulation segment is expected to majorly contribute to the revenues over the forecast period. Owing to the high prevalence of the condition, due to bladder muscle weakness post-pregnancy and menopause, women are more vulnerable to the condition, the launch of new products, and others.

According to the article published in Krager Journal titled "Mechanism and Priority of Botulinum Neurotoxin A versus Sacral Neuromodulation" for refractory overactive bladder, in June 2021, overactive bladder is highly prevalent worldwide and found that its overall prevalence was 11.8%. Overactive bladder prevalence in adults over 18 years is 15.6% for men and 17.4% for women in Europe. Also, the same source reported that in Asia, the prevalence of overactive bladder was 5.9% among men and 6.0% among women. Such a high burden of diseases is expected to drive the growth of the market segment.

Additionally, the strategic initiatives taken by the market players are also expected to propel the growth of the market segment. For instance, in March 2022, Valencia Technologies Corporation received United States Food and Drug Administration (FDA) premarket approval (PMA) of its eCoin leadless tibial neurostimulator for the treatment of urinary urge incontinence (UUI), which affects over 60% of patients who suffer from overactive bladder (OAB). Such approvals are expected to contribute to the growth of the market segment.

Thus, owing to the abovementioned factors, the market segment is expected to project growth over the forecast period.

##### North America is Expected to Hold a Significant Share in the Market and Expected to do Same in the Forecast Period

North America is expected to lead the overactive bladder treatment market. This can be credited to its well-established healthcare industry. With reimbursement of overactive bladder treatment, the growing prevalence of the disease with rising age, and the presence of major players, the market is expected to grow during the forecast period.

Additionally, the increasing aging population is also expected to propel the growth of the market. For instance, as per the Statistics Canada 2021 census, there were around 7,021,430 people aged 65 years or above, out of which 3,224,680 were males and 3,796,750 were females. The presence of such a large geriatric population in the region is expected to boost the growth of the market as the geriatric population is more vulnerable to overactive bladder disease.

The initiatives taken by the market players for the development of the treatment and approvals from the regulatory authorities also propel the growth of the market. For instance, in April 2021, Medtronic plc received approval from the United States Food and

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Drug Administration (FDA) to proceed with an investigational device exemption (IDE) trial to evaluate its internally developed implantable tibial neuromodulation (TNM) device. It is a therapy designed to provide relief from symptoms of bladder incontinence. The TITAN 1 feasibility study is a prospective, multicenter feasibility study to characterize the procedure for the implantable TNM device in subjects with bladder incontinence. Such studies may lead to the development of new therapies in the near future and thus may drive the growth of the market.

Thus, owing to the abovementioned factors, the North American region is expected to project growth in the market over the forecast period.

#### Overactive Bladder Treatment Market Competitor Analysis

The overactive bladder treatment market is moderately fragmented, with global pharmaceutical companies controlling a significant market share. Moreover, the generic space of the market is observing a trend of consolidation and high competition. Major market players include AbbVie Inc. (Allergan), Astellas Pharma Inc., Laborie, Endo International PLC, Hisamitsu Pharmaceutical Co., Inc., Johnson & Johnson Services, Inc., Medtronic, Pfizer Inc., and Sanofi, Teva Pharmaceutical Industries Limited, and Macleods Pharmaceuticals Ltd., Urovant Sciences, and Uro Medical, among others.

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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