

Disposable Incontinence Products (Dips) Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The disposable incontinence products (DIPs) market is expected to witness a CAGR of 5.0% during the forecast period.

Renal failure is the prevailing cause of death from COVID-19. Together with other parameters that constitute the risk profile for severe COVID-19 evolution, disposable incontinence products proved extremely useful for the elderly patient management of COVID-19. According to a Johns Hopkins University article on the impact of COVID-19 on kidney diseases updated in March 2022, some people infected with COVID-19 showed signs of kidney damage, and even those with no prior kidney problems were infected. Furthermore, approximately 30% of COVID-19 patients hospitalized in New York and China developed moderate or severe kidney injury. Moreover, the increasing number of hospitalizations during the COVID-19 pandemic also contributed to the augmented demand for disposable incontinence products. Thus, COVID-19 had a profound impact on the market studied.

The key factors propelling the growth of the market studied are the rising prevalence of renal diseases and nephrological injuries, technological advancements in the material used for disposable products and catheters, and increasing awareness about personalized care and hygiene. For instance, according to an article published in Elsevier in October 2021, the prevalence of UI ranged from 20.3% to 54.5%. Stress UI was the main type reported. The main predisposing factors were chronic respiratory diseases and constipation. Thus, rising prevalence of diseases are expected to boost the market during the forecast period.

New product launches are expected to fuel the market during the forecast period. For instance, in November 2021, the Flume Catheter Company Ltd (TFCC), a medical device company dedicated to developing an improved alternative to the Foley indwelling urinary catheter, announced that it received clearance from the US Food and Drug Administration (FDA) to market the Flume catheter in the United States. Thus, the market strategies opted by suppliers and manufactures will contribute toward the growth of market.

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However, severity of side effects associated with the continuous use of incontinence products and limited reimbursement are expected to restrain the growth of the market during the forecast period.

Disposable Incontinence Products Market Trends

The Leg Urine Bag Sub-segment is Expected to Dominate the Urine Bag Segment

In the urine bag segment of the disposable incontinence products (DIPs) market, the leg urine bag sub-segment is expected to have the largest market size. A leg bag is a urine bag that finds its application in daycare and mobile users. The leg bag shall be connected to a bladder catheter or a urinal condom. For a discreet fixation on the leg, a leg bag holder can be used to hide the leg bag beneath the clothing. It is coated with soft fleece for comfortable wear.

The growth of the segment is primarily attributed to the rising awareness about personalized care and hygiene. For instance, in January 2022, Friends Dry Pants launched a digital film to spread awareness of using adult diapers. Also, in July 2021, Nobel Hygiene Friends, the adult diaper brand, launched "Fear of Falling," a one-minute video film across its digital platforms. Through this film and the corresponding #BreakTheFall campaign, Friends hoped to educate viewers about the risk elders face in attempting to use the toilet alone at night. Thus rising awareness will boost the market studied during the forecast period.

Furthermore, there is an increasing number of people suffering from renal diseases. Several small companies are manufacturing leg urine bags and making them easily available for use, leading to their increased adoption in developing countries and the growth of the overall segment.

The Asia-Pacific Region Indicates Large Growth Opportunities for the Disposable Incontinence Products (DIPs) Market

The countries in the Asia-Pacific region, such as Japan, China, South Korea, and Australia, were observed to possess higher awareness about health and hygiene, which is expected to reinforce growth prospects over the forecast period. In addition, countries such as China, India, and Japan, have a large base of geriatric populations, rising urban cities, and high hospitalization rates, which prompted the global players to actively invest in the adult disposable incontinence market in this region.

According to the World Health Organisation 2021 update, in 20 years, the population of people over 60 years old in China is projected to reach 28% of the population, up from 10%, due to longer life expectancy and declining fertility rates, making it one of the most rapidly-aging populations in the world. Due to its aging population, Japan has a growing number of senior citizens with kidney-related diseases. For instance, according to the government of Japan, the percentage of people aged 65 and over (the percentage of the elderly) has also been increasing, and it is among the highest in the world. It was 28.4% in 2019 and is expected to reach 33.3% in 2036 and 38.4% in 2065. Thus, the growing geriatric population will fuel the market during the forecast year.

Several middle-high-income populations, particularly in China and Japan, are increasing their demand for high-value-added products. Ease of availability through various online and offline channels is also expected to fuel the growth of the market.

Key product launches, the high concentration of market players, and the manufacturer's presence are some factors driving the growth of the disposable incontinence products market in the region. For instance, in December 2021, Otsuka Pharmaceutical Factory Inc. launched an intermittent urological catheter, "Actreen," a medical device, for which OPF concluded an exclusive marketing agreement with B. Braun Aesculap Japan Co. Ltd. This product is a single-use catheter consisting of a catheter (tube) and connector that can be used during self-catheterization in people who have lost the urge to urinate or who usually have difficulty urinating. In March 2022, the US-based Sonoma Pharmaceuticals, a global healthcare leader, launched Microdox, an

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urinary tract infection catheter and bladder rinse in New Zealand, Australia, and South Africa. Unicharm Company is one of the major dominant players in Southeast Asian countries, such as Thailand and Indonesia. In addition, several companies are adopting in-store sales strategies, often tied with government campaigns and television advertisements. Thus, Asian countries are expected to promise large growth opportunities during the forecast period.

Disposable Incontinence Products Market Competitor Analysis

The disposable incontinence products (DIPs) market is highly competitive and consists of several major players. In terms of market share, few major players currently dominate the market. However, with technological advancements and product innovation, mid-size to smaller companies are increasing their market presence by introducing new products at fewer prices. Companies like Becton Dickinson and Company, Kimberly Clark Corporation, Medline, Cardinal Health, and Coloplast Ltd hold substantial market shares in the disposable incontinence products (DIPs) market.

Additional Benefits:

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

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