

Bladder Scanners Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The bladder scanners market is estimated to be USD 134.43 million in 2021, registering a CAGR of 5.55% during the forecast period.

The COVID-19 pandemic affected the global economy and the bladder scanner market. Various public health organizations issued guidelines for the diagnosis of bladder cancer during the pandemic. For instance, according to the study published in the National Library of Medicine in January 2021, the outpatient visit of urology patients was minimized, and only patients with progressively deteriorating disease conditions or organ or life-threatening conditions were recommended to visit the urology clinic. The urology procedures other than emergency cases were deferred.

In addition, patients with outpatient urological procedures such as prostate biopsy follow-up cystoscopy, ureteral stents, nephrostomy tube replacement, and intravesical therapy for low-risk nonmusical invasive bladder cancer were deferred from visiting the clinics. However, the article titled 'Study explores OAB symptoms emerging in COVID-19 patients' published in September 2021 reported that patients with COVID-19 were experiencing new onset and worsening overactive bladder (OAB) symptoms resulting from cystitis. It is also known as COVID-19-associated Cystitis (CAC), which includes increased urinary urgency, frequency, nocturia, and pain. Such new symptoms associated with COVID-19 propel the growth of the market. Similarly, initiatives by the key market players during the pandemic are expected to increase the market growth. For instance, in January 2022, Laborie Medical Technologies Inc. announced the acquisition of an exclusive license to the Optimum Urethral Drug-Coated Balloon (DCB). Thus, the market is expected to grow during the forecast period.

A bladder scanner is a non-invasive ultrasound device or a tool that provides a virtual two or three-dimensional (3D) or (2D) image of the bladder and the volume of urine retained within the bladder for diagnosing, managing, and treating urinary outflow

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dysfunction. The increasing prevalence of urological diseases is driving the growth of the bladder scanner market.

The growing burden of cancer related to the urinary tract creates the need for diagnostics and scanning devices and thus propels the growth of the market. For instance, the Global Cancer Observatory Statistics 2021 reported that bladder cancer and prostate cancer are among the top 10 high-incidence cancers globally. The same source also reported that in 2021, the estimated number of new cases of bladder cancer was 573,278, and that of prostate cancer was 1,414,259 cases among both sexes in the year 2020. Such a high incidence of cancer worldwide is propelling the market over time.

Furthermore, the increasing accessibility to technologically advanced scanners also propels the market's growth. For instance, in March 2021, Lingen Davies Cancer Fund funded a new bladder scanner for the radiotherapy department at Royal Shrewsbury Hospital. The new bladder scanner is expected to allow a more accurate reading. It is expected to prevent a further CT Scan and therefore increase capacity in the department allowing patients with bladder, prostate, gynecological, or colorectal tumors to access this enhanced scanning equipment.

Moreover, in September 2021, Liliium Otsuka Co. Ltd, a subsidiary of Otsuka Pharmaceutical Factory Inc., launched Liliium-SPOT2, an improved version of Liliium-SPOT, a device for assisting urination timing prediction, as a healthcare appliance (non-medical device) that allows users to check the amount of urine in the bladder easily. The users can check the level of urine accumulation on a scale display by applying ultrasonic waves to the position of the bladder.

Additionally, the acquisition among the market players for the advanced technology for developing the product is also boosting the market's growth. For instance, in April 2020, Essity acquired novioscan. The company develops a wearable ultrasound technology that monitors the bladder and enables continence control. Such an acquisition may also drive the growth of the market.

Thus, the high burden of urological conditions and technological advancement in scanners propel the market's growth over the forecast period.

Bladder Scanners Market Trends

Portable Bladder Scanners Segment is Expected to Hold a Significant Market Share

Portable bladder scanners are ultrasound devices that use automated technology to register bladder volume digitally, including post-void residual (PVR) volume, and provide three-dimensional images of the bladder.

The major advantage of the portable ultrasound bladder scanner is to be a user-friendly diagnostic procedure with high-end accuracy. Another main benefit of a portable bladder ultrasound scanner is its portability, reliability, cost-effectiveness, and non-invasiveness.

The increasing prevalence of urological diseases and the rising preference for portable bladder scanner use are the key factors for the growth of the bladder scanner market. According to a research study published in BMC Geriatrics Journal in March 2021, the study results found that the highest prevalence of urinary incontinence was reported to be 45.1% in older women in Asia. Healthcare professionals (primarily nurses) use the device to measure postvoid residual (PVR) urine volume and prevent unnecessary catheterization, and these products may improve the diagnosis and differentiation of urological problems, which helps in the management and treatment of urological diseases, including the establishment of voiding schedules, study of bladder biofeedback, fewer urinary tract infections (UTIs), and monitoring of potential urinary incontinence after surgery or trauma.

Therefore, the increasing prevalence of urological diseases and the rising preference for portable bladder scanners are the key

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factors for the growth of the bladder scanner market.

North America is Expected to Dominate the Market and Expected to do Same in the Forecast Period

North America is expected to dominate the bladder scanner market globally due to the rising prevalence of urological diseases and high healthcare expenditure. New product approvals, the growing prevalence of urological disorders, increasing diagnostic procedures, and increasing utilization of mobile portable ultrasound devices in clinics and hospitals contribute to the growth of the bladder scanners market.

According to the National Institutes of Health data updated in September 2021, chronic kidney disease (CKD) affects nearly one-seventh of all adults in the United States (i.e., 37 million people). The risk of CKD is much higher for Americans with diabetes or high blood pressure, the two most frequent causes of kidney disease. Kidney disease affects nearly one-third of diabetics and one-fifth of those with high blood pressure. Heart disease and a family history of renal failure are two more risk factors for kidney disease.

Additionally, as per the Canadian Institute for Health Information and the Canadian Patient Safety Institute, data updated March 2021, Urinary tract infections (UTIs) are the fifth most common type of healthcare-associated infection, with an estimated 62,700 UTIs in acute care hospitals (US) every year. UTIs account for more than 9.5% of infections reported by acute care hospitals. Hence, increasing chronic diseases led to an increased demand for bladder scanners, which increased the demand for bladder scanners in the region.

Adopting artificial intelligence in the devices helps in better workflow, accuracy, detection, and diagnosis of the disease. The launch of technically advanced products by market players is also augmenting the growth of the market studied. For instance, in June 2021, Verathon released the Bladderscan i10. It is a next-generation bladder volume measuring technology that may empower users with new capabilities that enhance leadership in ease of use and dependability. Additionally, the product safeguards clinical confidence through Imagesense, Verathon's proprietary artificial intelligence deep learning technology.

Hence, due to the aforementioned factors, the bladder scanners market is anticipated to propel over the analysis period in North America.

Bladder Scanners Market Competitor Analysis

The bladder scanner market is moderately competitive and consists of several major players. In terms of market share, a few major players dominate the market. Market participants are adopting numerous strategies to sustain market competition, including acquisitions and collaborations. Some market players are GE Healthcare Inc., Mcube Technology Co. Ltd, Echo-Son SA, Patricia Industries (LABORIE), Roper Technologies Inc., SRS Medical Systems Inc., and Vitacon, among others.

Additional Benefits:

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

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