

Urodynamic Equipment Market - Growth, Trends, and Forecasts (2023 - 2028)

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Report description:

The urodynamic equipment market is expected to register a CAGR of 6.3% during the forecast period.

COVID-19 had a significant impact on the urodynamic equipment market. The lockdown measures and the restrictions imposed by the government reduced urological services, including outpatient clinic appointments, outpatient investigations and treatments, and urological surgery. For instance, from an article published in European Urology in August 2022, it has been observed that 28% of outpatient clinics, 30% of outpatient investigations, and 31% of urological surgeries were delayed for more than eight weeks in Saudi Arabia. In addition, as per the same source, urological services for benign conditions were more affected as compared to malignant conditions. Thus, delayed urological diagnostic and surgical procedures have impacted the demand for urodynamic equipment during the COVID-19 pandemic. However, relaxed government restrictions, resumed urological services and surgical procedures, as well as increased hospital visits, are expected to increase the demand for urodynamic equipment, which is anticipated to fuel market growth over the forecast period.

The factors such as the increasing burden of urologic diseases and disorders, the growing geriatric population, and technological advancements in urodynamic equipment are boosting the market growth. The increasing cases of urologic diseases such as bladder cancer, infection or inflammation of the urinary bladder, kidney stones, urinary incontinence problems, and others among the population is the key factor driving market growth. For instance, as per an article published in June 2022, urinary tract infections are the most common bacterial infections in women between the ages of 16 and 35 years globally. As per the same source, 10% of women experience an infection each year, and more than 40% to 60% experience an infection at least once in their lifetimes. This is expected to increase the need for urodynamic treatment and diagnosis of the condition or diseases, which is further anticipated to fuel market growth.

Additionally, as per an article published by the National Library of Medicine, in June 2022, an estimated 423 million people experience some form of urinary incontinence (UI) worldwide every year. Also, according to an article published in February 2021, nearly 1 in 2 women over the age of 50 experience problems with urinary incontinence, which is the uncontrolled leaking of pee

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and can range from a few drops of leakage to a full accident. Thus, the high prevalence of UI among the population is expected to raise the need for urinary catheters that helps in draining the bladder, hence propelling the market growth. Furthermore, the prevalence of urinary incontinence and other urological diseases is higher in elderly patients and has a negative impact on their quality of life. The changes associated with aging in the lower urinary system, such as decreased bladder capacity and feeling of fullness, decreased rate of detrusor muscle contraction, decreased pelvic floor muscle resistance, and increased residual urine volume, are some of the factors increasing the prevalence of urinary incontinence among people. For instance, elderly women have a greater risk for UTIs due to lower amounts of vaginal estrogen that change the vaginal climate, resulting in bacterial infections.

Moreover, the increasing company initiatives in developing technologically advanced equipment and products are also contributing to market growth. For instance, in March 2022, the Lok Nayak Hospital, Delhi, inaugurated a urodynamic video lab that provides real-time pictures of the urinary tract and bladder as well as immediate biofeedback. The lab has advanced equipment for studying urinary bladder dynamics, which helps in managing children with urological anomalies and diseases. Therefore, owing to the aforementioned factors, the studied market is expected to grow over the forecast period. However, the stringent regulatory policies for the validation of medical devices are likely to hinder the growth of the urodynamic equipment market over the forecast period.

Urodynamic Equipment Market Trends

The Uroflowmetry Equipment Segment is Expected to Hold Significant Market Share in the Market Over the Forecast Period

The uroflowmetry equipment segment is expected to witness significant growth in the urodynamic equipment market over the forecast period owing to factors such as the increasing burden of urological diseases such as urinary incontinence, rising chronically ill patients with the growing geriatric population, and technologically advanced products.

Uroflowmetry is a non-invasive diagnostic test used to diagnose patients with lower urinary tract symptoms. It measures the volume of urine released from the body, the speed with which it is released, and how long the release takes. It also aids in identifying the main cause and difficulties patient encounters while urinating. Thus, the accuracy in measuring the urine volume and assessing the exact reason and type of urological disease that causes urinary difficulties in the patients is high among these types of equipment as compared to other devices. This makes it more preferred, for most of the patients with suspected lower urinary tract dysfunction, over other devices.

Additionally, the rising incidences of benign prostate hyperplasia (BPH) condition in men also increases the need for uroflowmetry tests, which is expected to augment the segment's growth over the forecast period. For instance, from an article published by the National Center for Biotechnology Information in July 2021, it has been observed that the prevalence of BPH was 50% to 60% high in males in their 60s and 80% to 90% in those over 70 years of age. Furthermore, the increasing company activities in developing safe and effective diagnostic tests for measuring the urological condition among the population is also contributing to market growth. For instance, in November 2021, Oruba, a medical device company, launched the first self-operating uroflowmeter, Oruflow, that makes the screening procedure hygienic, safe, comfortable, and streamlined for both patients and physicians. Thus, owing to the aforementioned factors, the studied segment is expected to grow significantly during the forecast period.

North America is Anticipated to Hold a Major Share in the Market Over the Forecast Period

North America is expected to hold a significant share of the urodynamic equipment market over the forecast period. The factors attributed to the market growth are the increasing incidences of urological diseases and rising technological advancements in urodynamic equipment in the region. In addition, the rising geriatric population in the region is also expected to increase market growth. For instance, according to an article published by NCBI, in February 2021, it has been observed that urinary incontinence

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affects women disproportionately more than males and is significantly increased among women aged 60 years and older in the United States. Also, as per statistics published by the Fraser Institute, in July 2022, about 19% of the population living in Canada was aged 65 years and above, and this number is projected to reach 22.5% by 2030. Aging increases the risk of bladder problems such as bladder control issues and leakage or urinary incontinence. Thus, this is expected to increase the demand for urodynamic equipment for diagnosing and treating urological diseases over the forecast period.

Furthermore, the increasing product approvals and product launches in the region are also contributing to market growth. For instance, in July 2021, Gemini Medical Technologies launched a new line of urodynamics equipment by MEDKONSULT Medical Technology. Also, in February 2021, Health Canada approved Bactiguard's TempSensor catheter with a temperature sensor that reduces the risk of secondary infections such as catheter-associated urinary tract infection (CAUTI) in critically ill patients. Thus, owing to the aforementioned factors, the studied market is expected to grow significantly during the forecast period.

Urodynamic Equipment Market Competitor Analysis

The urodynamic equipment market is moderately competitive and consists of a few major players. In terms of market share, a few of the major players are currently dominating the market. And some prominent players are vigorously engaging in collaborations, acquisitions, and launching new products with other companies to consolidate their market positions across the globe. Some of the companies that are currently dominating the market are Medtronic Plc, Coloplast, Albyn Medical S.L., Boston Scientific Corporation, Coopersurgical, Inc., Medical Measurement Systems B.V., Verathon, Inc. (Roper Technologies, Inc.), Karl Storz SE & Co. KG, and Olympus Corporation.

Additional Benefits:

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

Table of Contents:

- INTRODUCTION
 - Study Assumptions and Market Definition
 - Scope of the Study
- RESEARCH METHODOLOGY
- EXECUTIVE SUMMARY
- MARKET DYNAMICS
 - Market Overview
 - Market Drivers
 - Increasing Burden of Urologic Diseases and Disorders
 - Growing Geriatric Population
 - Technological Advancements in Urodynamic Equipment
 - Market Restraints
 - Stringent Regulatory Policies For Validation of Medical Devices
 - Porter's Five Force Analysis
 - Threat of New Entrants
 - Bargaining Power of Buyers/Consumers
 - Bargaining Power of Suppliers

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- 4.4.4 Threat of Substitute Products
- 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

5.1 By Product Type

- 5.1.1 Urodynamic Equipment
 - 5.1.1.1 Cystometer
 - 5.1.1.2 Uroflowmetry Equipment
 - 5.1.1.3 Ambulatory Urodynamic Systems
 - 5.1.1.4 Electromyograph
 - 5.1.1.5 Video Urodynamic Systems
- 5.1.2 Urodynamic Consumables
 - 5.1.2.1 Urodynamic Catheters
 - 5.1.2.2 Urodynamic Pumps and Transducer Sets

5.2 By End User

- 5.2.1 Hospitals
- 5.2.2 Ambulatory Centers
- 5.2.3 Other End Users

5.3 By Geography

- 5.3.1 North America
 - 5.3.1.1 United States
 - 5.3.1.2 Canada
 - 5.3.1.3 Mexico
- 5.3.2 Europe
 - 5.3.2.1 Germany
 - 5.3.2.2 United Kingdom
 - 5.3.2.3 France
 - 5.3.2.4 Italy
 - 5.3.2.5 Spain
 - 5.3.2.6 Rest of Europe
- 5.3.3 Asia-Pacific
 - 5.3.3.1 China
 - 5.3.3.2 Japan
 - 5.3.3.3 India
 - 5.3.3.4 Australia
 - 5.3.3.5 South Korea
 - 5.3.3.6 Rest of Asia-Pacific
- 5.3.4 Middle East
 - 5.3.4.1 GCC
 - 5.3.4.2 South Africa
 - 5.3.4.3 Rest of Middle East
- 5.3.5 South America
 - 5.3.5.1 Brazil
 - 5.3.5.2 Argentina
 - 5.3.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

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- 6.1 Company Profiles
 - 6.1.1 Medtronic Plc
 - 6.1.2 Coloplast?
 - 6.1.3 Albyn Medical S.L.
 - 6.1.4 Boston Scientific Corporation
 - 6.1.5 Coopersurgical, Inc.
 - 6.1.6 Laborie (Medical Measurement Systems B.V.)
 - 6.1.7 Verathon, Inc. (Roper Technologies, Inc.)
 - 6.1.8 Karl Storz SE & Co. KG
 - 6.1.9 Olympus Corporation
 - 6.1.10 Gemini Medical Technologies
 - 6.1.11 White Bridge Investments S.p.A (Delta Med S.p.A.)

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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