

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

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Report description:

The urinary incontinence treatment devices market was valued at USD 3392.92 million in 2021 and is expected to record a CAGR of 6.6% during the forecast period.

In the initial days of the COVID-19 pandemic in 2020, several countries were in lockdown. Suspension in trade with other countries and travel restrictions led to a decline in diagnosis and surgical procedures in the first half of 2020.

According to a study published in the British Journal of Surgery, in May 2020, based on a 12-week period of peak disruption for hospital services due to the COVID-19 pandemic, around 28.4 million elective surgeries worldwide were canceled or postponed in 2020. In addition, more than 580,000 planned surgeries in India were canceled or delayed because of the COVID-19 pandemic, according to a study conducted by an international consortium in May 2020.

The major factor contributing to the market's growth is the rising prevalence of urinary incontinence (UI). Numerous factors such as urinary tract infection, weakening of pelvic floor muscles and urethral sphincters, menopause, pregnancy, childbirth, and post-radical prostatectomy surgery in men lead to the development of urinary incontinence symptoms. A study titled "Prevalence of Urinary Incontinence among Young Healthy Females in Gujarat - A Cross-sectional Study," published in June 2021, found that after the study period of 11 months from December 2017 to October 2018, among the total population, the prevalence of UI was 71.85% among young women who were healthy and aged between 18-25 years, of whom 50.85% had stress, 9.16% had urge, and 40% had a mixed type of urinary incontinence.

An article titled "Urinary Incontinence in Postmenopausal Women (2019)," published in the National Center for Biotechnology Information (NCBI), found that there has been a rise in the incidence of various diseases, such as Parkinson's disease, diabetes,

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multiple sclerosis, etc., which may lead to increased prevalence of urinary incontinence in males and females. This is expected to boost demand for urinary incontinence treatment devices over the forecast period. Furthermore, the growing demand for minimally invasive procedures and increasing technological advancements are expected to boost market growth. Increasing research and development in the field of UI is creating awareness among people and opportunities in the market studied, which is expected to propel the market's growth.

Moreover, market players are adopting various strategies, such as product launches, developments, acquisitions, mergers, and collaborations, to expand their product portfolio in the market studied, which is boosting the market growth. For instance, in November 2019, Renovia Inc. announced the US Food and Drug Administration's (FDA) 510(k) clearance for its next-generation leva Pelvic Digital Therapeutic, which will be used for strengthening pelvic floor muscles and for the treatment of stress and mixed and mild to moderate urgency urinary incontinence (UI) in women.

However, factors such as a lack of awareness about devices and social stigma associated with the disease, and the risks and complications related to the procedures, are expected to impede market growth over the forecast period.

Urinary Incontinence Treatment Devices Market Trends

Urethral Slings Segment Expected to Witness Healthy Growth over the Forecast Period

The urethral slings segment is expected to witness growth as these are highly recommended for surgical treatment for the treatment of stress urinary incontinence.

A study entitled "A Global Survey on the Impact of COVID-19 on Urological Services," published in August 2020, showed that during the COVID-19 pandemic, the outpatient clinics for female urinary incontinence, benign prostatic hyperplasia, infertility, sexual medicine, renal stone, benign scrotal conditions, and bladder stone were the most affected, among others. Besides, there was a decline across various types of outpatient investigations and procedures during the outbreak in 2020. Particularly surgical procedures for female urinary incontinence, infertility, renal stones, and bladder stones had the highest rates of decline in services. These affected the growth of the segment negatively.

Urethral slings surgery is also known as mid-urethral sling surgery. The sling material used may be muscle, ligament, or tendon tissue taken from the woman or an animal, such as a pig. It may also be composed of synthetic material, such as plastic compatible with body tissues or absorbable polymer that disintegrates over time.

According to an article published in February 2021, titled "Urinary Incontinence in Women Common, but Treatable," urinary incontinence is the unconditional loss of urine, which can be a few drops of leakage to a full accident and almost 1 in 2 women over the age of 50 years deal with issues related to urinary incontinence. This article also mentioned that more than 25 million Americans admit that they regularly face issues controlling their bladders. The rising prevalence of urinary incontinence among women and the aging population is boosting the demand for urethral sling surgery.

Furthermore, the quick recovery time of procedures is increasing its demand among the patient population. Apart from the low risk rates and advantages offered by sling procedures, the increasing demand for minimally invasive surgeries is also boosting the segment's growth.

Boston Scientific launched a redesign of its mesh sling system in February 2019, which is a surgical implant for stress urinary incontinence in male patients. The surgical mesh is also implanted to support the urethra neck to correct stress urinary incontinence (SUI).

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Moreover, the growing volume of urinary incontinence and cumulative research in urinary incontinence treatment are the major factors for the growth of the urethral slings segment.

North America Expected to Hold a Significant Market Share over the Forecast Period

The major factors driving the market growth in the North American region are increases in the prevalence of urinary incontinence (UI), the geriatric population, and the demand for minimally invasive surgeries in the region.

Urology platform market players suffered a decline in revenues due to the COVID-19 pandemic. For instance, the interventional urology segment of Coloplast Corp. generated negative organic growth (-7%) in the financial year 2019-20. The negative growth was mainly due to a decrease in sales of Altis single-incision slings and other products, followed by the cancellation of elective surgeries and procedures in the US after the COVID-19 outbreak. Elective procedures outside the US were also postponed in several countries during the COVID-19 outbreak.

The market studied has shown growth in the North American region despite the negative impact of the pandemic owing to other factors. As of July 2019, the Canadian geriatric population included 6,592,611 people, which accounted for 17.5% of the Canadian population, as per the Government of Canada's statistics report. The proportion of senior citizens in Canada has been increasing with time. As aging increases the risk of bladder problems such as bladder control issues, and leakage or urinary incontinence, thus, the increasing aging population is positively influencing the Canadian urinary incontinence treatment devices market.

As per the article published in Medscape in June 2021, titled, "What is the prevalence of urinary incontinence?," it was estimated that UI would affect 10-13 million people in the US. Additionally, the cost of treatment of UI in the US alone is USD 16.3 billion, 75% of which is spent on the treatment of women. This increasing prevalence of UI in the US is expected to propel the market's growth.

Strategies adopted by major companies, such as research and development, mergers and acquisitions, and product launches to strengthen their market position are another driving factor for the growth of the market studied. In February 2020, Atlantic Therapeutics announced that the US Food and Drug Administration (FDA) had granted over-the-counter (OTC) clearance to INNOVO, a non-invasive, clinically proven, and wearable device for the treatment of stress urinary incontinence (SUI) in adult females. Therefore, these aforementioned factors are expected to boost the urinary incontinence treatment devices market in the region over the forecast period.

Urinary Incontinence Treatment Devices Market Competitor Analysis

The urinary incontinence treatment devices market is moderately competitive. Some of the companies currently dominating the market are Boston Scientific Corporation, Becton, Dickinson and Company, Coloplast Corp., Promedon Group, AMI GmbH, Johnson & Johnson, Zephyr Surgical Implants, Medtronic PLC, Caldera Medical Inc., Hollister Incorporated, Nipro Corporation, Karl Storz SE & Co. KG, B Braun Melsungen AG, Baxter International Inc., and ConvaTec Group PLC, among others.

Additional Benefits:

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

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