

Ostomy Care Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 147 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The ostomy care market is currently valued at USD 2,952.53 million and is expected to witness a CAGR of 4.25% over the forecast period.

The outbreak of the COVID-19 pandemic negatively impacted the ostomy care business, as only the most acute ostomy surgeries were performed following the outbreak. Stoma care is a potentially overlooked aspect of the outbreak, and no specific stoma care recommendations were published during the pandemic. According to the study published by the National Library of Medicine in March 2022, ostomies decreased by 19.5% during the time between March 2020 and February 2021. Thus, the decline in surgeries related to ostomies hampered the growth of the market during the pandemic. However, the demand for ostomy care products required for home care considerably increased during the same period as most of the patients opted for home treatments. Therefore, this factor is expected to maintain the steady growth of the market.

The major factor contributing to the growth of the market studied is the high prevalence of inflammatory bowel diseases (IBD), including ulcerative colitis or Crohn's disease, and colorectal cancer, resulting in increased ostomy surgery cases. According to the World Health Organization (WHO) updates from July 2021, an increase of around 70% is expected in colorectal cancer cases across the world by 2030. Furthermore, according to statistics published by GLOBOCAN, colorectal cancer (CRC) is the fourth most common type of cancer among the German population, and approximately 57,528 new cases of CRC were reported in Germany in 2021. Additionally, according to statistics provided by GLOBOCAN, approximately 33,815 new cases of colon cancer and 11,951 new deaths were reported in the United Kingdom increase the demand for ostomy surgeries and devices, thereby boosting the market growth over the forecast period.

The developments of efficient and suitable pouching systems and associated accessories, which help to improve the quality of life of ostomy patients, is expected to open up the growth horizons for the studied market over the forecast period. For instance, the company Trio Healthcare launched a silicone-based ostomy seal, Trio Siltac. Trio Ostomy Care is the only company that offers silicone-based ostomy seal. This product aids in preventing leakage and protecting the skin around the stoma. Such technological

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

advancements are anticipated to propel the market growth over the forecast period.

Furthermore, an increase in initiatives to raise awareness about ostomy in individuals further propels the growth of the market. According to the United Ostomy Association of America Inc. (UOAA), in October 2021 in the United States, the UOAA was working to improve the quality of ostomy healthcare and promote higher standards of care in all healthcare settings. The organization commemorates World Ostomy Day on the first Saturday of October every year to raise awareness about ostomy care. Such initiatives will create awareness among the general population about stoma care, thereby aiding the market growth. Thus, all the aforementioned factors are expected to boost the market over the forecast period.

However, the risk of skin irritation and infections associated with ostomy products restrains the market studied.

Ostomy Care Market Trends

Ostomy Bags Segment is Expected to Exhibit a Significant Market Growth Over the Forecast Period

Ostomy bags are medical devices used to collect stool or urine. They are most commonly used with urostomies, ileostomies, and colostomies. Thus, an increase in the prevalence of bladder cancer, urinary continence, radiation injury, and spinal cord injuries is a major factor driving the segment.

The demand for these bags has increased over the years due to the increasing incidence of inflammatory bowel diseases (IBD). For instance, according to the research study by Thomas Joshua Pasvol et al., published in BMC Journal in August 2021, in the United Kingdom, the incidence of inflammatory bowel disease (IBD), Crohn's disease (CD), and ulcerative colitis (UC) was found to be 28.6, 10.2, and 15.7/100,000 population, respectively. Such a high incidence of these diseases is expected to drive market growth.

The rising number of product launches for ostomy bags is expected to further drive the segment's growth in the coming future. The introduction of efficient and suitable ostomy bags, which help to improve the quality of life of ostomy patients, is expected to provide ample growth opportunities for the segment's growth. For instance, in June 2021, Pelican Healthcare Ltd., located in Cardiff, strengthened its position as one of the leading manufacturers of disposable stoma devices in the United Kingdom and Ireland healthcare sectors with the introduction of the ModaViostomy bag range. Owing to the above-mentioned factors, the studied segment of the ostomy care market is expected to grow significantly over the forecast period.

North America Holds a Significant Share in the Market and Expected to do the Same Over the Forecast Period

North America dominated the ostomy care market and accounted for the largest revenue share owing to the factors such as an increase in the number of stoma patients due to Crohn's disease, ulcerative colitis, and rising awareness initiatives related to ostomy care or stoma surgical procedures.

According to the American Cancer Society's estimates, the estimated 106,180 and 44,850 new cases of colorectal cancer and rectal cancer were reported in the United States for the year 2021. A colostomy is done as part of an operation to treat colorectal cancer; thus the high number of colorectal cancer cases is contributing to the rise in ostomy care products.

Moreover, several market players are engaged in providing strategic initiatives that support the market's growth. For instance, in April 2021, Welland Medical expanded its business in Canada through its distributor, Premier Ostomy Centre. It is one of the company's newest distributors and is manufacturing stoma care products and accessories that are directly available to people living in Canada with a stoma. Such developments are likely to boost the market growth in the nation over the forecast period. Additionally, in January 2022, Owens & Minor Inc. and Apria Inc. entered into a definitive agreement under which Owens & Minor

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

will acquire Apria. The acquisition is anticipated to broaden the company's ostomy portfolio. Thus, all the aforementioned factors are expected to boost the market growth in the North American region.

Ostomy Care Market Competitor Analysis

The competitors in the market for ostomy care are either adding more features to their existing products or launching new product lines to gain a larger share of the market. Key market players are constantly incorporating technologies that can meet the specific requirements of patients. The studied market consists of several international and local companies that hold the majority of the market shares and are well known, including ALCARE Co., Ltd., Braun Melsungen AG, Coloplast A/S, ConvaTec Group Plc., Cymed, and Hollister Inc.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Growing Prevalence of Inflammatory Bowel Diseases
 - 4.2.2 Technological Advancements in the Arena of Ostomy Care
 - 4.2.3 Increase in Initiatives to Raise Ostomy Awareness
- 4.3 Market Restraints
 - 4.3.1 Risk of Skin Irritation and Infections
- 4.4 Porter's Five Forces Analysis
 - 4.4.1 Threat of New Entrants
 - 4.4.2 Bargaining Power of Buyers/Consumers
 - 4.4.3 Bargaining Power of Suppliers
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)

- 5.1 By Product Type
 - 5.1.1 Ostomy Bags
 - 5.1.2 Ostomy Accessories
- 5.2 By Surgery Type
 - 5.2.1 Colostomy
 - 5.2.2 Ileostomy

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.2.3 Urostomy
- 5.3 By End User
 - 5.3.1 Hospitals and Specialty clinics
 - 5.3.2 Home care settings
 - 5.3.3 Ambulatory Surgical Centers
- 5.4 Geography
 - 5.4.1 North America
 - 5.4.1.1 United States
 - 5.4.1.2 Canada
 - 5.4.1.3 Mexico
 - 5.4.2 Europe
 - 5.4.2.1 Germany
 - 5.4.2.2 United Kingdom
 - 5.4.2.3 France
 - 5.4.2.4 Italy
 - 5.4.2.5 Spain
 - 5.4.2.6 Rest of Europe
 - 5.4.3 Asia-Pacific
 - 5.4.3.1 China
 - 5.4.3.2 Japan
 - 5.4.3.3 India
 - 5.4.3.4 Australia
 - 5.4.3.5 South Korea
 - 5.4.3.6 Rest of Asia-Pacific
 - 5.4.4 Middle East & Africa
 - 5.4.4.1 GCC
 - 5.4.4.2 South Africa
 - 5.4.4.3 Rest of Middle East & Africa
 - 5.4.5 South America
 - 5.4.5.1 Brazil
 - 5.4.5.2 Argentina
 - 5.4.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 ALCARE Co., Ltd.
 - 6.1.2 Braun Melsungen AG
 - 6.1.3 Coloplast A/S
 - 6.1.4 Cymed
 - 6.1.5 ConvaTec Group Plc.
 - 6.1.6 Hollister Inc.
 - 6.1.7 Marlen Manufacturing & Development Co.
 - 6.1.8 Nu-Hope Laboratories
 - 6.1.9 Perma-Type Company, Inc
 - 6.1.10 Salts Healthcare
 - 6.1.11 Welland Medical Ltd
 - 6.1.12 Torbot Group Inc

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.1.13 Flexicare Group Limited

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Ostomy Care Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 147 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

