

Germany Contraceptive Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Germany Contraceptive Devices Market size is estimated at USD 539 million in 2024, and is expected to reach USD 724.71 million by 2029, growing at a CAGR of 6.10% during the forecast period (2024-2029).

Key Highlights

- The COVID-19 pandemic had a negative impact on the contraceptive devices market in Germany due to supply chain disruptions and closures of fertility clinics and gynecology OPDs in the initial phases. This led to a decline in the use of intrauterine devices (IUDs) during the pandemic. However, the market recovered in the later phase as restrictions were lifted. Currently, COVID-19 is expected to have a negligible impact on the market, and it is projected to register a stable growth rate during the forecast period.
- The increasing incidence of sexually transmitted diseases, unintended pregnancies, and government initiatives are major factors driving the growth of the German contraceptive devices market. The large number of Ukrainian refugees arriving in Germany, many of whom are HIV-positive, creates a high demand for contraceptive devices like condoms to prevent both STDs and unwanted pregnancies. The German government's increased funding to end AIDS by 2030 is expected to boost market growth during the forecast period.
- Strategic initiatives such as product innovation, launches, and partnerships by market players are also contributing to the market's growth. For instance, the development of the Coso male contraceptive device, which uses ultrasound waves to temporarily halt sperm regeneration, won the James Dyson Award in September 2021. Technological advancements in contraceptive devices are expected to drive demand in the country.
- However, the market growth may be restrained due to the side effects associated with the use of contraceptive devices. Despite this, the high number of people affected by STDs and the rising launches of technologically advanced contraceptive devices are expected to contribute to the growth of the market over the analysis period.

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Germany Contraceptive Devices Market Trends

Intra Uterine Device (IUD) is Estimated To Grow at a High Rate During The Forecast Period

- The market for intrauterine devices (IUDs) is projected to experience high growth during the forecast period, driven by the benefits of IUDs and the increasing number of advanced IUDs launched by market players. According to a Statpearls article updated in July 2022, the advantages of IUDs include their efficacy, ease of use, reversibility, and patient satisfaction, particularly with respect to the time commitment for long-term use and cost-effectiveness. IUDs are also among the most effective forms of long-acting reversible contraception (LARC), with efficacy comparable to that of tubal ligation and vasectomy. As a result, the advantages and high success rate of IUDs are expected to drive demand for them during the forecast period.
- The most widely used reversible IUD is the copper IUD, and this segment is expected to grow owing to the high number of abortions in the country and the increasing number of innovations and launches. According to a 2023 report from Statistisches Bundesamt (Destatis), a total of 99.9 thousand abortions were reported in 2022, and the Federal Statistical Office (Destatis) reported a 16.7% increase in the number of abortions in the third quarter of 2022 compared with the same period in 2021.
- In addition, a June 2022 article in the Journal of Health Monitoring reported that 94.6 thousand abortions were reported in Germany in 2021. Consequently, the rising number of abortions in the country presents an opportunity for market players to develop effective and innovative contraceptive devices that can prevent unwanted abortions naturally. Thus, the market segment is expected to grow during the forecast period.
- The growth of the IUD segment is expected to be driven by technological advancements, such as the fertility-preserving intrauterine device, Womed Leaf, developed by women's health tech company Womed. In September 2021, Womed obtained a CE mark for Womed Leaf, which can treat and prevent bonding of the uterine walls after surgical intervention. Womed Leaf is one of the world's first mechanical barriers against intrauterine adhesion (IUA), consisting of a soft film that protects the entire uterine cavity for a week. Such innovations are expected to contribute to the growth of the IUD segment during the forecast period.
- Therefore, due to the high number of unwanted abortions and product launches, the IUD market segment is expected to experience significant growth during the forecast period.

Condoms are Expected to Hold a Significant Market Share Over the Forecast Period

- A condom is a sheath-shaped barrier device designed to be used during sexual intercourse to reduce the likelihood of pregnancy or the transmission of sexually transmitted infections (STIs). Male and female condoms are both available, and their use can significantly reduce the risk of contracting gonorrhea, chlamydia, trichomoniasis, hepatitis B, and HIV/AIDS. They also offer some protection against genital herpes, human papillomavirus (HPV), and syphilis.
- The condom industry is expected to experience growth due to innovations in condom design and an increase in public awareness of the importance of condom use. For example, according to a June 2022 article by DurexCondoms, external condoms are more effective than traditional condoms, with an 82% effectiveness rate when used as directed. While internal condoms generally offer greater efficacy than external condoms, they are still 79% effective when used as directed. As a result, market players' ongoing efforts to develop better condoms are expected to drive growth in the segment.
- The increasing prevalence of STIs, such as syphilis, is another factor expected to contribute to the segment's growth. Condoms are an effective means of preventing the spread of these diseases. For example, a research study published in April 2022 in the Frontiers in Public Health Journal estimated that the incidence rate of syphilis (6.5/100,000 standardized person-years) resulted in approximately 5,256 new cases of syphilis annually in the German population.
- Furthermore, a study published in June 2022 in the BMC Public Health Journal reported that the prevalence of chlamydia was 2.8% among all sexually active 15 to 17-year-old girls and 9.6% among those who reported being sexually active. As a result, the

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high burden of STIs, such as chlamydia and syphilis, is expected to increase condom usage, reducing the risk of transmission and contributing to the segment's growth during the forecast period.

- In conclusion, the condom segment is expected to experience growth during the forecast period due to the aforementioned factors.

Germany Contraceptive Devices Industry Overview

The German market for contraceptive devices is moderately competitive and comprises several key players. Market leaders with significant funds for research and development and a well-established distribution network have established their dominance in the market. The major players in the market include AbbVie (Allergan PLC), Pfizer Inc., Bayer AG, Reckitt Benckiser Group Plc, and The Cooper Companies Inc. (Cooper Medical).

Additional Benefits:

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

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