SCOTTS INTERNATIONAL

Bladder Scanners - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 140 pages | Mordor Intelligence

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Report description:

Bladder Scanners Market Analysis

The Bladder Scanner market is expected to grow from USD 169.40 million in 2025 to USD 179.6 million in 2026 and is forecast to reach USD 240.6 million by 2031 at 6.02% CAGR over 2026-2031. This trajectory underscores steady demand as aging populations, catheter-associated urinary tract infection (CAUTI) prevention mandates, and artificial-intelligence-enabled ultrasound technologies converge to redefine bedside bladder volume assessment. Heightened regulatory scrutiny from the Centers for Medicare & Medicaid Services (CMS) ties reimbursement to CAUTI metrics, prompting hospitals, ambulatory surgical centers (ASCs), and long-term-care facilities to prioritize non-invasive scanning devices. Clinical evidence supporting 79.5% concordance between point-of-care ultrasound (POCUS) findings and in-house diagnostics fuels rapid emergency-medicine uptake. Meanwhile, Verathon's ImageSense AI engine achieves □7.5% accuracy above 100 mL, satisfying payer demands for objective measurement. Capital constraints and operator-skill gaps continue to restrict penetration in rural and developing areas, yet flexible leasing models and simplified user interfaces are beginning to mitigate adoption barriers.

Global Bladder Scanners Market Trends and Insights

Aging population and CAUTI-prevention mandates

Global life expectancy gains translate into higher urinary-retention incidence, prompting clinicians to adopt scanners that reduce unnecessary catheter insertions while preserving accuracy. CMS quality programs link payments to CAUTI outcomes, and facilities using bladder scanners have documented 80% catheter-reduction success, spotlighting the technology as a core infection-control tool.

Point-of-care ultrasound integration in emergency and peri-operative care

Handheld scanners achieve near-cart-based image quality, supporting rapid triage decisions where minutes matter. Enhanced Recovery After Surgery (ERAS) pathways further incentivize intra-operative scanning to limit catheter-associated complications and speed discharge timelines.

High capital cost and limited budgets in small practices

Base-model scanners cost USD 15,000-40,000, and service contracts can double lifetime outlay, discouraging adoption where reimbursements are low and patient volumes modest. Leasing and pay-per-use models are emerging, yet return-on-investment remains marginal for solo practitioners.

Other drivers and restraints analyzed in the detailed report include:

AI-enabled 3D volume measurement improving reimbursement eligibilityNursing-home CAUTI penalty programsShortage of trained operators in rural settings

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

3D scanners generated 52.18% of the Bladder Scanner market share in 2025 by delivering volumetric accuracy that conventional 2D models cannot match. The segment is forecast to expand at 6.04% CAGR to 2031 as evidence compares mean errors of 11.17% against catheter-derived volumes. 2D devices remain preferred where budgets are tight; however, AI-assisted algorithms have narrowed the gap, posting 0.97 correlation with expert measurements.

Growth momentum for 3D scanners hinges on reimbursement rules that increasingly mandate objective bladder-volume evidence, while declining component costs make premium models accessible beyond tertiary hospitals. In parallel, 2D systems target primary-care and screening settings by coupling lower price tags with cloud-based analytics that upgrade over time. Both categories reinforce the Bladder Scanner Market trajectory by meeting diverse accuracy-versus-affordability thresholds across geographies.

Portable/cart-based systems held 60.74% of the Bladder Scanner market size in 2025 as many hospitals retain established imaging suites that favor wheeled devices. Nevertheless, handheld units are advancing at 6.38% CAGR, spurred by sub-2 lb form factors tethered to tablets or smartphones that facilitate bedside use in crowded emergency rooms.

The appeal of hand-carried models lies in faster patient turnover and reduced dependence on ultrasound technologists, a pivotal benefit for ASCs striving for same-day discharge. Bench-top scanners serve niche urology clinics that value compact, fixed workstations. Continuous-monitoring implants under university development hint at the next segmentation evolution, yet commercialization timelines place them beyond current Bladder Scanner Market revenue modeling.

The Bladder Scanner Market Report is Segmented by Product Type (2D Ultrasound Bladder Scanners, and More), Portability (Portable/Cart-Based, and More), Technology (AI-Enabled Imaging, Conventional Imaging), End User (Hospitals & Clinics, Ambulatory Surgical Centers, and More), Application (Urology, Obstetrics & Gynecology, and More), and Geography (North

America, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America generated 38.74% of global revenue in 2025, anchored by CMS payment models that reward CAUTI reduction and by widespread AI-enabled ultrasound familiarity among clinicians. Ongoing FDA quality-system updates slated for 2026 are expected to harmonize manufacturing benchmarks, reducing procurement risk for providers.

Asia-Pacific is forecast to post a 6.85% CAGR through 2031, underpinned by expanding healthcare investments and accelerating POCUS training programs. China and India spearhead volume demand as tertiary centers adopt 3D scanners for surgical wards, while Japan and South Korea emphasize AI algorithms that align with national digital-health strategies. Australia and Southeast-Asian markets favor portable units compatible with constrained clinical footprints.

Europe shows balanced growth amid CE-mark standardization and infection-prevention campaigns integrating bladder scanners into national quality frameworks. Germany, France, Italy, Spain, and the United Kingdom drive adoption based on public-insurance reimbursement, whereas Central and Eastern European countries adopt through donor-funded procurement. South America and Middle East & Africa remain nascent yet promising as infrastructure upgrades prioritize affordable, easy-to-train modalities in high-burden urological settings.

List of Companies Covered in this Report:

Abbott (BioTelemetry) AliveCor BIOTRONIK BPL Cardiac Insight Inc. CardioComm Solutions Compumed Inc. EDAN Instruments Fukuda Denshi Co. GE Healthcare Hillrom (Baxter) iRhythm Technologies Medtronic Mindray Nihon Kohden OSI Systems (Spacelabs) Koninklijke Philips Schiller Shenzhen Creative Welch Allyn

Additional Benefits:

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

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