

Urinary Incontinence Devices Markets Worldwide

Report Highlights

January 2010

Report Benefits

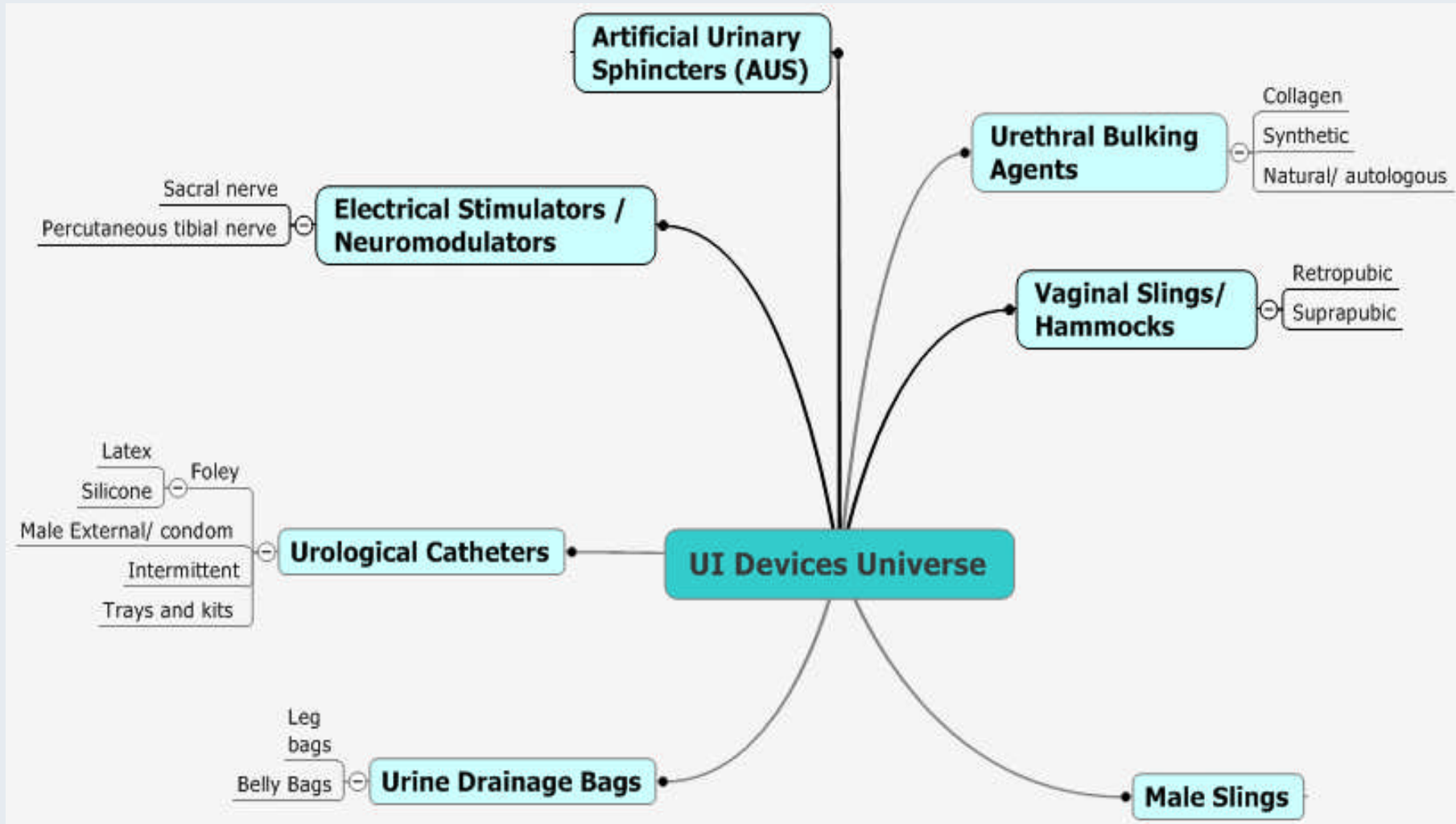
This report can help in:

- Assessing the market for Urinary Incontinence Management Devices worldwide, growth segments, and growth regions.
- Understanding market drivers and restraints, market segmentation, and competitive segmentation.
- Strategic planning and competitive strategy.
- Identifying opportunities for partnerships and alliances.

Key Takeaways

- **The world market for urinary incontinence (UI) devices is expected to reach over \$1.68 billion by the end of 2009.**
- **The market for UI devices is largely underpenetrated. UI is one of the most prevalent disorders affecting about 30% of women worldwide, about 15 million people in the US, and one of the most common reasons for hospitalization.**
- **Clinical treatments include urethral bulking agents, slings, neurostimulators and artificial sphincters. Urethral catheters that drain urine into bags are used in patients who cannot be treated.**
- **Fastest growing segments are vaginal slings, which are the most cost-effective to date, and less invasive compared to artificial sphincters.**

Incontinence Devices Universe



Key Market Drivers & Restraints

Drivers

- Full reimbursement available for diagnostic evaluation and treatment.
- Technological advances have produced less invasive, more cost effective devices such as transobturator slings.
- Increased awareness of medical treatment options for UI, primarily due to advertising of pharmacologic options.

Restraints

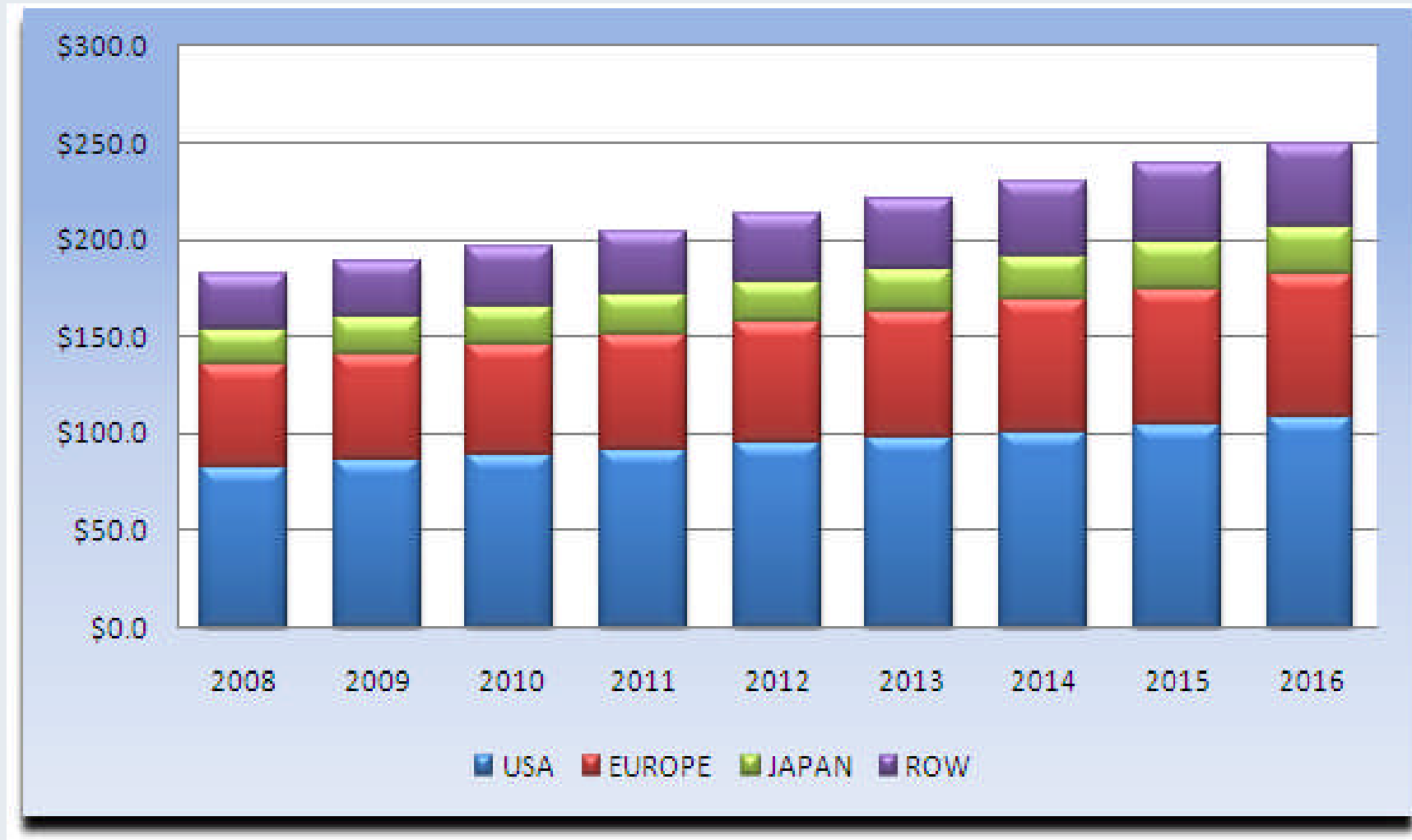
- Most people do not seek help due to embarrassment and lack of understanding about treatment options. Cultural barriers in many countries exacerbate this problem.
- Patients may be averse to using implanted devices, particularly the AUS which needs to be manually inflated and deflated. Similarly, some patients who need to use catheters are not comfortable with having to self-catheterize.
- Drug treatments pose stiff competition to devices since patients prefer drugs as a less invasive alternative and there is a wide range of drug treatments available.

Sample Market Data Table

World Urinary Incontinence Catheters Revenue Forecasts by Country/Region - 2008-2016

YEAR	USA	EUROPE	JAPAN	ROW	TOTAL	GROWTH (%)
2008						
2009						
2010						
2011						
2012						
2013						
2014						
2015						
2016						

Sample Chart



Regions Covered	US, Europe, Japan, Rest of the World (ROW)
Product/Market Segments	<ul style="list-style-type: none">• Artificial Urinary Sphincters (AUS)• Urethral Bulking Agents (Injectables)• Electrical Stimulators (Neuromodulators)• Female Slings• Male Slings• Urinary Catheters• Urinary Drainage Bags
Companies Profiled	~ 125 companies worldwide
Market Estimates/ Forecasts	In US dollars for 2008-2016
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