

Global Catheters Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

Industry: Medical Devices & Equipment

URL: <https://www.mordorintelligence.com/industry-reports/catheters-market>

Global Catheters Market Size and ShareMarket OverviewStudy Period | 2020 - 2031

Market Size (2026) | USD 65.86 Billion |

Market Size (2031) | USD 89.05 Billion |

Growth Rate (2026 - 2031) | 6.23 % |

Fastest Growing Market | Asia Pacific |

Largest Market | North America |

Market Concentration | Medium |

Major Players*Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

Global Catheters Market Analysis by Mordor IntelligenceCatheters market size in 2026 is estimated at USD 65.86 billion, growing from 2025 value of USD 62.0 billion with 2031 projections showing USD 89.05 billion, growing at 6.23% CAGR over 2026-2031. Demographic aging, a rising burden of chronic cardiovascular and renal disease, and broader acceptance of minimally invasive procedures continue to stimulate demand. Technology cycles that deliver smarter coatings, embedded sensors, and AI-aided designs further widen the clinical utility of catheter products. At the same time, supply-chain re-engineering for specialty polymers and silicone has become a strategic focus as manufacturers strive to maintain consistent quality and pricing. Competitive positioning pivots on innovation pipelines, as firms look to consolidate fragmented product niches and defend intellectual property. Opportunities remain strong in home-based self-care, where supportive reimbursement and telehealth services enable non-institutional treatment pathways, extending the addressable catheters market well beyond traditional hospital settings.

Key Report Takeaways* By product type, cardiovascular catheters led with 28.35% of catheters market share in 2025, whereas neurovascular catheters are projected to grow at a 7.05% CAGR through 2031.

* By end user, hospitals controlled 67.65% of the catheters market in 2025; home-care settings show the fastest expansion at a 7.22% CAGR to 2031.

* By application, cardiovascular procedures accounted for a 30.05% share of the catheters market size in 2025, while dialysis applications are set to advance at a 7.49% CAGR during the forecast period.

* By geography, North America held 42.85% of the catheters market in 2025, yet Asia-Pacific is on track to rise at an 8.02% CAGR through 2031.

Note: Market size and forecast figures in this report are generated using Mordor Intelligence's proprietary estimation framework, updated with the latest available data and insights as of 2026.

Market Trends and InsightsDrivers Impact Analysis of Global Catheters Market*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

Rising prevalence of cardiovascular, neurological & urological disorders | +1.8% | Global, aging populations | Long term (≥ 4 years) |

Increasing uptake of minimally invasive interventions | +1.5% | North America & EU leading; APAC accelerating | Medium term (2-4 years) |

Surge in demand for antimicrobial & hydrophilic-coated catheters | +1.2% | Global

1 | Short term (≤ 2 years) |

Rapid adoption of home-based self-catheterization | +0.9% | Developed markets first; expanding to emerging economies | Medium term (2–4 years) |

Integration of smart/connected sensor catheters | +0.7% | US, EU, Japan | Long term (≥ 4 years) |

Growth of ambulatory surgical centers in emerging markets | +0.6% | APAC core, MEA & Latin America spill-over | Medium term (2–4 years) |

Source: Mordor Intelligence |

Rising Prevalence of Cardiovascular, Neurological & Urological Disorders Cardiovascular disease now affects 655 million individuals, while stroke incidence climbed 15% from 2019–2024, driving adoption of neurovascular catheters for thrombectomy procedures [1] Editorial Team, “Stroke Incidence and Global Burden,” Nature, nature.com. Chronic kidney disease impacts 850 million people and lifts demand for dialysis access catheters as hemodialysis populations in developed regions expand 6% annually. This epidemiological momentum makes catheter volumes less sensitive to economic cycles and underscores their role as essential care tools within the broader catheters market.

Increasing Uptake of Minimally Invasive Interventions Catheter-based techniques represent 75% of cardiovascular procedures in developed healthcare systems, up from 45% ten years ago. Medtronic’s PulseSelect pulsed-field ablation platform posted 30% revenue growth in 2024, reflecting a system-wide push to lower hospital stays and improve outcomes [2] Investor News, “PulseSelect Achieves 30% Revenue Growth,” Medtronic, medtronic.com. Robotic navigation solutions such as Stereotaxis EMAGIN also enhance precision while curbing radiation exposure. These dynamics reinforce sustained demand across the catheters market as payers seek greater procedural efficiency.

Surge in Demand for Antimicrobial & Hydrophilic-Coated Catheters Catheter-associated infections account for 40% of hospital-acquired infections that cost global systems USD 35 billion annually. Hydrophilic coatings can cut urinary tract infection rates by 64% over uncoated devices. New US HCPCS codes effective January 2026 reimburse hydrophilic catheters, building an economic case for rapid uptake. The convergence of proven clinical efficacy and favorable payment terms broadens premium coating adoption across the catheters market.

Rapid Adoption of Home-Based Self-Catheterization Self-catheterization enhances quality of life and reduces facility dependence. Patient education programs and lighter, single-use devices increase adherence, with satisfaction levels rising despite higher unit costs. Telemedicine adds remote oversight, while a 25% jump in home dialysis use from 2020–2024 signals durable demand for home-ready catheter systems. As policy makers favor care decentralization, the home segment becomes a meaningful growth channel within the catheters market.

Restraints Impact Analysis of Global Catheters Market *Restraint | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

Catheter-associated infections & biofilm formation | -0.8% | Global, acute care | Short term (≤ 2 years) |

Availability of non-catheter substitutes | -0.6% | Technology-advanced markets | Medium term (2–4 years) |

Polymer & silicone supply-chain volatility | -0.5% | Global manufacturing | Short term (≤ 2 years) |

Reimbursement pressure in mature markets | -0.4% | North America & EU | Long term (≥ 4 years) |

Source: Mordor Intelligence |

Catheter-Associated Infections & Biofilm Formation Indwelling catheter infection rates touch 25% in some settings, with catheter-related bloodstream infections carrying mortality rates up to 25%. As regulators tighten infection control protocols, device dwell time restrictions and more frequent replacements raise costs and complicate clinical workflows, curbing short-term momentum in the catheters market.

Polymer & Silicone Supply-Chain Volatility PTFE shortages have lifted material costs to 20% of device revenue, up from 12% in 2020. Manufacturers are pursuing vertical integration and alternative materials, yet qualification testing and regulatory clearances lengthen timelines, creating intermittent product shortages across the catheters market.

*Our forecasts treat driver/restraint impacts as directional, not additive. The impact forecasts reflect baseline growth, mix effects, and variable interactions.

Global Catheters Market Segment Analysis
By Product: Cardiovascular Leadership Amid Neurovascular Acceleration
Cardiovascular catheters delivered 28.35% of the catheters market in 2025, supported by entrenched clinical protocols across angiography, ablation, and electrophysiology. This maturity ensures stable volumes as hospitals routinely stock multiple sizes and configurations. The catheters market size for cardiovascular interventions is projected to widen at a steady clip in line with coronary disease prevalence. Neurovascular catheters, while still smaller by revenue, advance at a 7.05% CAGR as stroke centers expand and mechanical thrombectomy devices prove efficacy. Stanford's milli-spinner technique posts 90% success versus 50% for legacy systems, underscoring technology-led upside.

Innovation pipelines remain active. Steerable tips, refined braiding, and softer polymers elevate neurovascular navigation, narrowing risk profiles and opening new procedural indications. Intravenous catheters stay the highest-volume consumable in hospital supply chains, but margin pressures persist given commoditized pricing. Specialty designs—ranging from occlusion balloons to drug-eluting configurations—command premium pricing and cushion profitability. Across categories, clinical evidence, reimbursement clarity, and material availability shape share shifts inside the broader catheters market.

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.
By End User: Hospital Dominance Challenged by Home-Care Growth
Hospitals represented 67.65% of 2025 sales, reflecting their central role in emergent and complex procedures that demand surgical suites and imaging infrastructure. This top position illustrates the catheters market size concentration within institutional care. However, home-care settings expand 7.22% annually as telehealth monitoring and simplified devices enable chronic-care patients to manage treatment without repeated admissions. The new 2026 HCPCS codes incentivize home-use devices, which could tilt procurement budgets toward community channels.

Ambulatory surgical centers capture incremental share by performing routine catheter procedures in cost-controlled environments. Providers value fast patient turnaround and lower overhead compared with tertiary hospitals. Insurers steer appropriate cases to these facilities, ensuring sustained volume. Over the forecast horizon, end-user dynamics will hinge on the pace of care decentralization and on how swiftly payers adapt reimbursement frameworks, ultimately redefining sales channels for the catheters market.

By Application: Cardiovascular Procedures Lead, Dialysis Accelerates
Cardiovascular interventions accounted for 30.05% of the catheters market size in 2025, spanning angioplasty, structural heart, and electrophysiology. Clinical familiarity and robust evidence bases keep demand resilient, even amid cost-containment pressures. Dialysis access emerges fastest at 7.49% CAGR on the back of rising renal disease prevalence and expanded home dialysis programs. BD's Pristine long-term hemodialysis catheter achieved 100% patency at 30 days and 91% at 180 days, signaling design improvements that enhance clinical confidence.

Urological applications maintain steady mid-single-digit growth fueled by aging populations and improved patient acceptance of intermittent catheterization. Complex neurovascular and structural cardiac uses, although smaller, provide outsized

ed margin opportunities as sophisticated designs attract premium pricing. Application trends therefore diversify revenue streams and underline the multi-faceted demand drivers sustaining the catheters market.

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

Geography Analysis
North America Catheters MarketNorth America retained 42.85% of global revenue in 2025, underpinned by advanced hospital networks, early technology adoption, and favorable reimbursement. The FDA's breakthrough-device pathway has quickened market entry for novel catheters, while Medicare coverage expansions offer tailwinds for high-value devices. Even so, mature-market price compression and hospital budget scrutiny put a ceiling on volume growth. Regulatory stability and predictable payment landscape still make the region a testing ground for premium catheter technologies, cementing its influence on the catheters market.

Europe Catheters MarketEurope stands as the second-largest cluster, shaped by the Medical Device Regulation. Stringent technical documentation and post-market surveillance raise compliance costs, especially for small firms, potentially consolidating supplier bases. Infection-prevention priorities and antimicrobial stewardship stimulate demand for coated and single-use devices. Brexit-related logistics challenges and shifts in public-tender rules, including moves to exclude certain foreign suppliers, complicate supply-chain planning yet may favor local manufacturing. The net impact is a cautious but quality-focused European catheters market.

APAC Catheters MarketAsia-Pacific is the fastest-growing theater, expanding at an 8.02% CAGR through 2031. Health-system modernization, rising surgical volumes, and government investment in universal care strengthen underlying demand. The region's medical-technology spending is projected to hit USD 225 billion by 2030. Local manufacturing incentives, technology-transfer agreements, and a burgeoning private-hospital segment in India and Southeast Asia lower entry barriers. Nevertheless, heterogeneous regulatory regimes and price-cap policies require nuanced go-to-market strategies for firms seeking to scale in the APAC catheters market.

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

Regulatory LandscapeCatheters are regulated as medical devices across major markets, where product risk class and intended use shape the evidence package and review route. In the United States, many intravascular catheters fall under FDA Class II pathways and typically require 510(k) clearance, alongside compliance with 21 CFR Part 820 quality requirements. FDA finalized revisions to its Medical Device Quality System Requirements with an effective date of February 2, 2026, which raises the bar on harmonized quality management expectations for manufacturers and key suppliers.

In Europe, Regulation (EU) 2017/745 (MDR) governs conformity assessment, technical documentation, and post-market surveillance. Manufacturers continue to manage the MDR transition using the extended timelines for legacy devices, with deadlines running through 2027-2028 depending on class. Internationally, consensus standards remain an anchor for safety and performance claims, including ISO 10555-1:2023 for sterile, single-use intravascular catheters, alongside broader QMS and biocompatibility expectations used in regulatory submissions and audits.

Value Chain AnalysisThe catheter value chain runs from medical-grade material su

pliers through component processing and finished-device manufacturing, then sterilization and packaging, and finally distribution into hospitals, ambulatory surgical centers, and home-care channels. Upstream inputs include polymers and elastomers (such as PVC, silicone, and polyurethane), reinforcement materials, coatings, and sterile barrier packaging; midstream value creation centers on design and engineering, tubing extrusion, assembly, surface treatments (including antimicrobial or hydrophilic coatings), and verification and validation activities aligned to regulated QMS expectations (commonly ISO 13485-aligned systems and region-specific requirements such as FDA QMS updates effective February 2, 2026).

Downstream, group purchasing organizations (GPOs), integrated delivery networks (IDNs), and national procurement frameworks influence pricing, standardization, and conversion decisions, especially for high-volume intravenous and urology products. Procurement-side notices also indicate that supply reliability has become a differentiator alongside clinical performance. NHS Supply Chain communications in 2026 flagged disruptions across multiple catheter categories and suppliers, including Teleflex self-retaining/intermittent catheters and Vygon central venous catheters, while separate notices referenced allocation controls for selected Medtronic perfusion cannulas following safety actions. These constraints keep attention on dual-sourcing qualified materials, validated alternate manufacturing routes (including sterilization capacity), and tighter inventory and logistics coordination between manufacturers, distributors, and large health systems.

Competitive Landscape

The catheters market remains moderately fragmented, with multinational corporations and specialized developers jostling for share. Industry leaders exploit scale advantages in sterile manufacturing, distribution, and clinical education while pumping funds into R&D to maintain technological edges. Consolidation gathers pace: Stryker's USD 4.9 billion acquisition of Inari Medical and BD's USD 4.2 billion purchase of Edwards Lifesciences' Critical Care division spotlight the premium assigned to innovation pipelines and therapeutic adjacencies.

Technology differentiation is a decisive lever. Players race to integrate antimicrobial coatings, embedded sensors, and AI-assisted modeling to deliver catheters that lower complication rates and enable real-time analytics. Teleflex's plan to split into two pure-play companies—one focused on vascular access and interventional products—illustrates strategic sharpening around high-growth niches. Patient applications in catheter technologies have risen 25% each year, indicating intense efforts to lock in competitive moats.

Emerging companies seize white-space opportunities in neurovascular, dialysis, and home-care segments where incumbent product lines lag evolving clinical protocols. At the same time, polymer sourcing challenges and regulatory overheads push smaller outfits to seek contract-manufacturing alliances or become acquisition targets. Overall, sustained investment in material science, sensor fusion, and user-centric design will dictate the pecking order across the catheters market.

Global Catheters Industry Leaders* Hollister

- * Medtronic Plc
- * Coloplast
- * Becton, Dickinson and Company
- * B. Braun Melsungen AG

* *Disclaimer: Major Players sorted in no particular order
Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.Global C

Catheters Market Companies Covered in this Report* Abbott Laboratories

- * B. Braun
- * Becton, Dickinson & Co. (C. R. Bard)
- * Boston Scientific
- * Coloplast
- * Convatec
- * Edwards Lifesciences Corp.
- * Hollister
- * Johnson & Johnson
- * Medtronic
- * Teleflex
- * Terumo Corp.
- * BIOTRONIK
- * Cook Group
- * Smiths Group
- * Cardinal Health
- * Merit Medical Systems
- * Penumbra
- * AngioDynamics
- * Amsino International

Read Analysis of Global Catheters Companies

Market Opportunities and Future Outlook

Care decentralization continues to create whitespace for catheters designed for home use, where patient training, telehealth oversight, and simplified single-use formats broaden the addressable channel for intermittent urinary catheters and dialysis-related access workflows. The report context points to a 25% jump in home dialysis use from 2020-2024, and it also cites the introduction of new US HCPCS codes effective January 2026 that reimburse hydrophilic catheters. Together, these factors strengthen the economic case for broader adoption of coated, patient-friendly devices outside hospitals.

Opportunity areas are also shaped by infection prevention and quality-system expectations. Infection prevention remains a major cost and outcomes driver, supporting demand for antimicrobial and hydrophilic coatings and for designs that reduce biofilm and complications. At the same time, FDA safety actions and recalls tied to reprocessed electrophysiology and ultrasound catheters, including a Class I recall initiated in December 2025 and expanded activity reported in June 2026, highlight a near-term reassessment of single-use versus reprocessed supply strategies. OEMs and providers have room to differentiate through reprocessing validation, along with traceability, particle control, and post-market surveillance capabilities. Innovation themes already visible in the market include sensor-enabled and data-generating catheters, as well as AI-supported design and manufacturing controls, which align with rising expectations for documented performance, usability, and real-world monitoring.

Recent Industry Developments in Global Catheters Market* June 2026: Medtronic launched its PulseSelect pulsed field ablation (PFA) system in India to support atrial fibrillation treatment programs. The launch expands access to newer ablation modalities in a large, fast-growing procedure market and strengthens Medtronic's installed-base leverage for compatible catheter and workflow adoption.

* November 2025: Hollister announced a policy change with a Durable Medical Equipment Medicare Administrative Contractor (DME MAC) to expand access to closed system intermittent catheters for Medicare beneficiaries with spinal cord injuries, effective January 1, 2026. The update improves reimbursement-linked access in the home-care channel and can accelerate conversion toward higher-value closed systems.

* May 2024: Coloplast launched the female version of its Luja intermittent catheter featuring Micro-hole Zone Technology, starting in Denmark and Italy. The rollout broadened the Luja portfolio and reinforced the competitive focus on user-specific designs and complication reduction for intermittent catheterization.

Table of Contents for Global Catheters Industry Report1. Introduction

* 1.1 Study Assumptions & Market Definition

* 1.2 Scope of the Study

2. Research Methodology

3. Executive Summary

4. Market Landscape

* 4.1 Market Overview

* 4.2 Market Drivers* 4.2.1 Rising prevalence of cardiovascular, neurological & urological disorders

* 4.2.2 Increasing uptake of minimally invasive interventions

* 4.2.3 Surge in demand for antimicrobial & hydrophilic-coated catheters

* 4.2.4 Rapid adoption of home-based self-catheterisation (under-reported)

* 4.2.5 Integration of smart/connected sensor catheters for real-time monitoring (under-reported)

* 4.2.6 Growth of ambulatory surgical centres in emerging markets (under-reported)

* 4.3 Market Restraints* 4.3.1 Catheter-associated infections & biofilm formation

* 4.3.2 Availability of non-catheter substitutes (e.g., drug pumps, stents)

* 4.3.3 Polymer & silicone supply-chain volatility (under-reported)

* 4.3.4 Reimbursement pressure in mature markets (under-reported)

* 4.4 Value / Supply-Chain Analysis

* 4.5 Regulatory Landscape

* 4.6 Technological Outlook

* 4.7 Porter's Five Forces Analysis* 4.7.1 Threat of New Entrants

* 4.7.2 Bargaining Power of Buyers

* 4.7.3 Bargaining Power of Suppliers

* 4.7.4 Threat of Substitutes

* 4.7.5 Intensity of Competitive Rivalry

5. Market Size & Growth Forecasts (Value, USD)

* 5.1 By Product* 5.1.1 Cardiovascular Catheters

* 5.1.2 Urology Catheters

* 5.1.3 Intravenous Catheters

* 5.1.4 Neurovascular Catheters

* 5.1.5 Specialty / Other Catheters

* 5.2 By End User* 5.2.1 Hospitals

* 5.2.2 Ambulatory Surgical Centres

* 5.2.3 Home-care Settings

* 5.2.4 Others

* 5.3 By Application* 5.3.1 Cardiovascular Procedures

* 5.3.2 Urinary Incontinence & Retention

* 5.3.3 Dialysis & Renal Disorders

* 5.3.4 Others

* 5.4 By 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 Market Concentration
- * 6.2 Market Share Analysis
- * 6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)* 6.3.1 Abbott Laboratories
- * 6.3.2 B. Braun Melsungen AG
- * 6.3.3 Becton, Dickinson & Co. (C. R. Bard)
- * 6.3.4 Boston Scientific Corp.
- * 6.3.5 Coloplast A/S
- * 6.3.6 ConvaTec Group PLC
- * 6.3.7 Edwards Lifesciences Corp.
- * 6.3.8 Hollister Incorporated
- * 6.3.9 Johnson & Johnson (DePuy Synthes)
- * 6.3.10 Medtronic PLC
- * 6.3.11 Teleflex Inc.
- * 6.3.12 Terumo Corp.
- * 6.3.13 Biotronik SE & Co. KG
- * 6.3.14 Cook Medical
- * 6.3.15 Smiths Medical
- * 6.3.16 Cardinal Health
- * 6.3.17 Merit Medical Systems
- * 6.3.18 Penumbra Inc.
- * 6.3.19 AngioDynamics Inc.
- * 6.3.20 Amsino International

7. Market Opportunities & Future Outlook

- * 7.1 White-space & Unmet-Need Assessment

Global Catheters Market Report Scope and Research MethodologyMarket Definition and CoverageFor this study, the catheters market is defined as revenues generated

from medical catheters that are inserted into the body for diagnostic, monitoring, or therapeutic use, and sold across hospital, ambulatory, and home-care settings.

Scope exclusions: We exclude after-market refurbishment services and catheter rental income from the market value.

Segments Covered in This Report* By Product* Cardiovascular Catheters

- * Urology Catheters
- * Intravenous Catheters
- * Neurovascular Catheters
- * Specialty / Other Catheters

- * By End User* Hospitals
- * Ambulatory Surgical Centres
- * Home-care Settings
- * Others

- * By Application* Cardiovascular Procedures
- * Urinary Incontinence & Retention
- * Dialysis & Renal Disorders
- * Others

- * By Geography* North America* United States
- * Canada
- * Mexico

- * Europe* Germany
- * United Kingdom
- * France
- * Italy
- * Spain
- * Rest of Europe

- * Asia-Pacific* China
- * Japan
- * India
- * Australia
- * South Korea
- * Rest of Asia-Pacific

- * Middle East & Africa* GCC
- * South Africa
- * Rest of Middle East & Africa

- * South America* Brazil
- * Argentina
- * Rest of South America

Data Sources, Market Sizing, and ValidationDesk Research

Desk work started with mapping catheter demand across the main care settings, then linking that demand to measurable signals that can be checked. We used public sources such as the US FDA device databases, US Centers for Medicare and Medicaid Services utilization files, the CDC for disease and hospitalization indicators, and OECD health statistics to track procedure and patient trends.

To keep assumptions grounded, we also reviewed trade and customs statistics where relevant, selected peer-reviewed clinical journals for adoption patterns (for example, infection prevention and coated products), and used annual reports and investor presentations to interpret product mix language and regional exposure. In parallel, we used a paid subscription for company financials and intelligence

and a patent database to sanity check innovation activity and product lifecycle timing. These examples are illustrative, and many other public sources were also consulted for data collection, validation, and clarification.

Primary Interviews and Surveys

Primary discussions were used to confirm what is actually purchased and used, and how pricing moves by catheter type and care setting. We spoke with a mix of manufacturers, distributors, hospital procurement teams, clinicians, and infection control specialists across APAC, EMEA, and the Americas, so assumptions on adoption, replacement cycles, and tender behavior could be confirmed and adjusted.

Distribution of primary research fieldwork respondents

Company type | Respondent position | Region |
Top tier: 33% | CXOs: 13% | APAC: 47% |
Mid tier: 50% | Functional/Unit leaders: 34% | EMEA: 30% |
Smaller Players: 17% | Managers: 53% | Americas: 23% |

Market-Sizing & Forecasting Sizing was built using top-down and bottom-up logic. We first reconstructed the total market by starting from care activity that typically drives catheter use, then applying catheter utilization intensity and value per use in a structured way, followed by country-based rollups to regional totals.

In the model, a few key inputs were tracked closely because they move the numbers in visible ways. These included procedure volumes for cardiac and dialysis related care, urinary retention and incontinence treatment activity, inpatient and outpatient admissions, average catheter replacement frequency by setting, and average selling price movement (influenced by coatings, safety features, and shifting mix toward specialty products). Where public data was thin, gaps were handled using proxy indicators like hospital bed capacity trends and expert-confirmed usage ratios, and then checked against supplier and channel feedback.

Forecasting relied mainly on scenario analysis tied to expected procedure growth and adoption of minimally invasive care, and then it was adjusted using expert views on pricing pressure and infection prevention standards. Final totals were corroborated with selective bottom-up approximations, such as sampled ASP times, estimated volumes for major catheter groups, and then tuned if the two perspectives diverged beyond a reasonable range.

Data Validation & Update Cycle Outputs were validated through several checks so that extreme swings were caught early. We compared modeled results against independent signals like procedure and admission trends, public reimbursement changes, and observed shifts in product mix from interviews, and then reviewed any large variances at the country and region level.

Before sign-off, assumptions and calculations are reviewed in multiple analyst passes, and re-contacts are triggered when a key input changes or a conflict appears between sources. Reports are refreshed annually, and interim updates are made when material events occur, with a final pre-delivery review so clients receive the most current view.

Mordor Intelligence's Catheters Market Size Measured Against Other Published Estimates Published catheter market numbers often differ because studies do not always count the same product families, revenue types, and time bases, even when the title looks identical. Differences also show up when one estimate leans on a single demand proxy, instead of cross-checking the result against clinical activity, pricing logic, and supply-side feedback.

Some external estimates appear to use earlier base years, or they may expand scope to include adjacent service revenues that sit around the device sale. In contrast

First, Mordor Intelligence counts only catheter product revenues across defined clinical uses and geographies, and it excludes after-market refurbishment services and rental income, which can otherwise inflate totals in certain settings.

Benchmark comparison

Source | Market Size | Gaps in Research Methodology |
Mordor Intelligence | USD 65.86 B (2026) | |
Industry Publisher A | USD 61.89 B (2025) | Uses a different base year and inflation timing, and the scope description does not clearly state exclusions for service-style revenues, which can shift the 2025 value versus a 2026 device-only count. |
Industry Publisher B | USD 58.25 B (2024) | Anchors on a 2024 base with a longer horizon, and the disclosed taxonomy is broad but does not specify treatment of refurbishment or rental related revenues, which can create a lower starting point and a different growth path. |
Overall, the spread is explained mostly by year selection and what is treated as in-scope revenue. By tying the sizing to observable procedure and setting activity, and then testing ASP and replacement assumptions through interviews, the resulting market value stays traceable to clear inputs and repeatable steps.

Key Questions Answered in the ReportWhat is the current Global Catheters Market size? The catheters market was valued at USD 65.86 billion in 2026 and is projected to reach USD 89.05 billion by 2031.

Who are the key players in Global Catheters Market? Hollister, Medtronic Plc, Coloplast, Becton, Dickinson and Company and B. Braun Melsungen AG are the major companies operating in the Global Catheters Market.

Which is the fastest growing region in Global Catheters Market? Asia Pacific is estimated to grow at the highest CAGR over the forecast period (2026-2031).

Which product segment leads the catheters market? Cardiovascular catheters hold the top spot, representing 28.35% of global revenue in 2025.

Related Reports Explore More ReportsEurope Urinary Catheters Market TrendsIntravascular Catheter Market TrendsMicro Guide Catheter Market TrendsMicrocatheters Market AnalysisNICU Catheter Market TrendsPeripheral Intravenous Catheters Market GrowthSmall Bore Connectors Market SizeTranscutaneous Bilirubinometers Market SizeGlobal Urinary Catheters Market AnalysisVascular Access Devices Market Size