

# Urolithiasis Management Devices- Market Insights, Competitive Landscape and Market Forecast–2027

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## Abstracts

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Urolithiasis Management Devices Market By Type (Diagnostics [X-Ray, Computed Tomography, Ultrasound, Others], Treatment [Shock Wave Lithotripters {Intracorporeal, Extracorporeal}, Ureteroscopes {Semi-Rigid, Flexible}, Stone Retrieval Devices, Others], By End-User (Hospitals, Ambulatory Surgical Centers, Others), by geography is expected to grow at a steady CAGR forecast till 2027 owing to rising prevalence of urolithiasis and sedentary lifestyle

The global urolithiasis management devices market was valued at USD 1,531.08 million in 2021, growing at a CAGR of 4.27% during the forecast period from 2022 to 2027 to reach USD 1,963.12 million by 2027. The Urolithiasis Management Devices market is witnessing positive growth owing to the rising prevalence of urolithiasis or nephrolithiasis. In addition, sedentary lifestyle such as obesity which is a risk factor for the development of kidney stones, innovation in product design, increased risk of end-stage renal failure, growing geriatric population, and intensifying awareness for the procedure is thereby contributing to the growth of the Urolithiasis Management Devices market during the forecast period from 2022-2027.

Urolithiasis Management Devices Market Dynamics:

The Urolithiasis Management Devices market is witnessing a growth in product demand owing to various reasons. The key factor includes the rising prevalence of urolithiasis across the globe.

According to the European Association of Urology 2019, the prevalence rates for urinary

stones vary from 1% to 20%, and in the countries with a high standard of life such as Canada, Sweden, or the US, renal stones prevalence is significantly high (>10%).

As per the British Association of Urological Surgeons 2021, Kidney stones are common. Patients undergoing a CT scan have an 8% chance of having kidney stones and its incidence has been steadily increasing since the early 20th century. Moreover, 1 in 11 people (9%) will get stone symptoms during their lifetime. Men are affected slightly more often than women. Patients of all ages suffer from stones, but the peak age for a first stone is around the age of 45.

According to the National Kidney Foundation 2021, over half a million people go to emergency rooms for kidney stone problems every year.

Moreover, a rise in sedentary lifestyle such as excessive consumption of alcohol, less consumption of water could also lead to the development of kidney stones. In addition, the growing burden of obesity among the population, a high-risk factor for the development of renal calculi, due to sedentary lifestyles such as poor dietary habits and lack of physical activities could also contribute to the Urolithiasis Management Devices market growth.

As per the World Health Organization (WHO) 2021 data, there was around 650 million obese population worldwide in the year 2016. Also, according to various studies, obese people develop more uric acid stones and calcium oxalate stones.

Also, the aging population is more prone to the formation of kidney stones and an increased risk of end-stage renal failure. As per the World Population Prospects, 2019, there were 703 million older persons aged 65 or over in 2019 globally. Therefore, as the aging population increases, there will be more prevalence of urolithiasis, which will eventually boost the demand for Urolithiasis Management Devices which will drive the growth of the Global Urolithiasis Management Devices market.

However, certain factors such as the high cost of ureteroscope devices and the postoperative complications like blood loss during internal bleeding may be certain limiting factors of the Urolithiasis Management Devices market growth.

The outbreak of the COVID-19 pandemic caused a significant decrease in emergency department visits. Moreover, there was a delay in outpatient clinic appointments which pushed the need towards virtual or telephone clinics. Due to a lack of in-hospital beds,

anesthesia or procedural slots, and healthcare professionals, these changes created a significant backlog in the treatment, thereby creating a negative impact on the Global Urolithiasis Management Devices market.

#### Urolithiasis Management Devices Market Segment Analysis:

Urolithiasis Management Devices Market By Type (Diagnostics [X-Ray, Computed Tomography, Ultrasound, Others], Treatment [Shock Wave Lithotripters {Intracorporeal, Extracorporeal}, Ureterscopes {Semi-Rigid, Flexible}, Stone Retrieval Devices, Others], By End-User (Hospitals, Ambulatory Surgical Centers, Others), and By Geography (North America, Europe, Asia-Pacific, and Rest of the World)

In the Treatment segment of the Urolithiasis Management Devices market, the Extracorporeal Shock Wave Lithotripters (ESWL) is estimated to hold a higher share in the Urolithiasis Management Devices market during the forecast period (2022-2027). This can be attributed to the specific features associated with these devices.

The large market share of this product segment can be attributed to the growing patient adoption of these devices and quick treatment. The main benefit of ESWL is that the treatment is totally non-invasive, as it does not involve any skin incisions or the use of any invasive surgical instruments to treat the stone. Instead, shock waves are utilized to shatter the stone into tiny fragments that flow through the ureter and out of the bladder.

It also has other advantages such as reduced pain, quick recovery time, and shorter hospital stays. This treatment method is chosen by a majority of the patient and physician population.

ESWL is suited for small stones as well as certain stones present in the upper portion of the ureter. Moreover, multiple stones can also be treated with ESWL. Therefore, it is expected that with such advantages offered by the Extracorporeal Shock Wave Lithotripsy Devices this technology is expected to increase its penetration in coming years, thus this will drive the segment to grow during the forecast period, which will have a positive impact on the overall Global Urolithiasis Management Devices Market growth.

Furthermore, Extracorporeal Shock Wave Lithotripsy Devices are gaining commercial acceptability, which also improves market penetration. All these advantages of these devices make physicians more inclined to use Extracorporeal Shock Wave Lithotripsy Devices.

Hence, all the above-mentioned factors are expected to drive the segment growth of the Urolithiasis Management Devices market.

North America is expected to dominate the overall Urolithiasis Management Devices Market:

Among all the regions, North America is expected to account for the largest share in the Global Urolithiasis Management Devices market. Factors such as the growing prevalence of stone formations causing urolithiasis and increased risk of end-stage renal disease among the population, rising product approvals are expected to aid in the growth of the North America Urolithiasis Management Devices Market.

As per the Canadian Urological Association guidelines 2021, globally, the prevalence of urolithiasis is steadily increasing, and though some regional variability exists, contemporary estimates report up to 10-12% of men and 7-8% of women now suffer from nephrolithiasis.

Moreover, according to the US Department of Health and Human Services 2021, end-stage renal disease (ESRD) is a significant public health problem in the United States and a major source of suffering and poor quality of life for those afflicted.

Another factor responsible for the growth of the Urolithiasis Management Devices market is the launch of new products in the region. For instance, in 2019, Dornier Medtech launched and announced the immediate availability of its new AXIS single-use digital flexible ureteroscope in the US.

In 2019, Shockwave Medical Inc. received breakthrough device designation for its intravascular lithotripsy (IVL) therapy, used for lithotripsy and was long used to eliminate kidney stones.

Thus, these factors are projected to contribute to the Urolithiasis Management Devices market during the forecasted period.

The rising adoption of Urolithiasis Management Devices in the country would result in the rising demand for treatments that make use of Urolithiasis Management Devices, which in turn would provide a conducive growth environment for the United States Urolithiasis Management Devices market as well as the North American region. Therefore, the interplay of various factors such as the presence of a large patient

population, encouraging reimbursement policies as well as new product launches in the region is expected to boost the North America Urolithiasis Management Devices market during the forecast period.

#### Urolithiasis Management Devices Market Key Players:

Some of the key market players operating in the Urolithiasis Management Devices market include Boston Scientific Corporation, EMS Urology, Advin Health Care, Inceler Medikal Co. Ltd., Walz Elektronik GmbH, DirexGroup, Medispec Ltd., Richard Wolf GmbH, STORZ MEDICAL AG, Olympus, General Electric Company (GE Healthcare), ESAOTE SPA, Shenzhen Mindray Bio-Medical Electronics Co. Ltd., BK Medical Holding Company, Inc., Hitachi Medical Systems, Laborie, DRAMI?SKI S. A., ACE Medical Devices Pvt. Ltd., Siemens Healthcare Private Limited, Vimex Sp. z o.o., and others.

#### Recent Developmental Activities in the Urolithiasis Management Devices Market:

In March 2021, Boston Scientific acquired Lumenis in a USD 1.07 billion deal. With this acquisition, Boston Scientific has strengthened its product portfolio for Lithotripsy devices. This will further add to the growth of the Global Urolithiasis Management Devices market.

In March 2021, Dornier MedTech GmbH became the world's first integrated urology company to be certified by the European Union's Medical Device Regulation (MDR). Dornier achieved the certification for its Class IIb products: Dornier Delta® III, one of the most powerful lithotripters that utilize Dornier's Extracorporeal Shock Wave Lithotripsy (ESWL) technology; and the Dornier UIMS™, a state-of-the-art information management software providing enhanced imaging and efficiency to support clinicians in treating kidney stones.

In August 2020, Olympus Winter & Ibe GmbH received the US FDA approval for OES Elite Ureteroscopes and Accessories under regulatory class II for endoscopic observation and therapy in the ureters, urethra, and urinary bladder.

#### Key Takeaways from the Urolithiasis Management Devices Market Report Study

Market size analysis for current Urolithiasis Management Devices market size (2021), and market forecast for 5 years (2022-2027)

The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the Urolithiasis Management Devices market.

Top key product/services/technology developments, merger, acquisition, partnership, joint venture happened for last 3 years

Key companies dominating the global Urolithiasis Management Devices market.

Various opportunities available for the other competitor in the Urolithiasis Management Devices market space.

What are the top performing segments in 2021? How these segments will perform in 2027.

Which is the top-performing regions and countries in the current Urolithiasis Management Devices market scenario?

Which are the regions and countries where companies should have concentrated on opportunities for Urolithiasis Management Devices market growth in the coming future?

Target Audience who can be benefited from this Urolithiasis Management Devices Market Report Study

Urolithiasis Management Devices products providers

Research organizations and consulting companies

Urolithiasis Management Devices-related organizations, associations, forums, and other alliances

Government and corporate offices

Start-up companies, venture capitalists, and private equity firms

Distributors and Traders dealing in Urolithiasis Management Devices

Various End-users who want to know more about the Urolithiasis Management Devices market and latest technological developments in the Urolithiasis Management Devices market.

Frequently Asked Questions for the Urolithiasis Management Devices Market:

#### 1. What is Urolithiasis Management Devices?

Urolithiasis Management Devices are devices used to manage Kidney stones (also called renal calculi, nephrolithiasis, or urolithiasis) that form inside kidneys.

#### 2. What is the market for Global Urolithiasis Management Devices?

The global urolithiasis management devices market was valued at USD 1,531.08 million in 2021, growing at a CAGR of 4.27% during the forecast period from 2022 to 2027 to reach USD 1,963.12 million by 2027.

#### 3. What are the drivers for the Global Urolithiasis Management Devices Market?

The Urolithiasis Management Devices market is witnessing a positive market growth owing to the rising prevalence of urolithiasis or nephrolithiasis. In addition, sedentary lifestyle such as obesity which is a risk factor for the development of kidney stones, innovation in product design, increased risk of end-stage renal failure, growing geriatric population, and intensifying awareness for the procedure is thereby contributing to the growth of the Urolithiasis Management Devices market.

#### 4. Who are the key players operating in the Global Urolithiasis Management Devices Market?

Some of the key market players operating in the Urolithiasis Management Devices market include Boston Scientific Corporation, EMS Urology, Advin Health Care, Inceler Medikal Co. Ltd., Walz Elektronik GmbH, DirexGroup, Medispec Ltd., Richard Wolf GmbH, STORZ MEDICAL AG, Olympus, General Electric Company (GE Healthcare), ESAOTE SPA, Shenzhen Mindray Bio-Medical Electronics Co. Ltd., BK Medical Holding Company, Inc., Hitachi Medical Systems, Laborie, DRAMI?SKI S. A., ACE Medical Devices Pvt. Ltd., Siemens Healthcare Private Limited, Vimex Sp. z o.o., and others.

#### 5. Which region has the highest share in Urolithiasis Management Devices Market?

North America is expected to hold the highest share in the revenue in the Urolithiasis Management Devices market during the forecast period. Factors such as the growing prevalence of stone formations causing urolithiasis and increased risk of end-stage renal disease among the population, rising product approvals, are expected to aid in the growth of the North America Urolithiasis Management Devices Market in this region.



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