

Global Aquablation Therapy Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G34102E69E8EEN.html>

Date: January 2026

Pages: 89

Price: US\$ 4,480.00 (Single User License)

ID: G34102E69E8EEN

Abstracts

The global Aquablation Therapy market size is expected to reach \$ 4322 million by 2032, rising at a market growth of 10.1% CAGR during the forecast period (2026-2032).

Aquablation therapy is a transurethral, minimally invasive approach for treating lower urinary tract symptoms (LUTS) due to benign prostatic hyperplasia (BPH). It combines real-time transrectal ultrasound (TRUS) imaging for anatomical mapping and resection planning with robotic execution of a high-velocity sterile saline waterjet that cuts and removes obstructive prostate tissue within a predefined treatment zone. Unlike thermal modalities (electrocautery/laser), Aquablation is positioned as a heat-free, image-guided, robot-assisted workflow designed to improve reproducibility and reduce variability associated with thermal injury. The average gross profit margin of this product is 35%.

Aquablation sits at the intersection of two powerful trends: minimally invasive BPH surgery and surgical robotics. Regulators and evidence frameworks clearly define its intended use and technical pathway—transurethral, image-guided (TRUS) robotic execution of a high-velocity sterile saline waterjet for prostate tissue removal—supporting standardized pathway building in hospitals. Reimbursement mechanics are also becoming more predictable: Aquablation has been granted a Category I CPT code effective January 1, 2026, helping translate an innovative technique into more manageable coding and hospital pathway planning. Internationally, NICE guidance states transurethral water-jet ablation may be used with standard arrangements for governance, consent, and audit—reinforcing compliant, repeatable adoption.

Scaling is constrained less by the concept and more by platform economics and workflow change. Aquablation requires capital equipment, intraoperative TRUS

integration, and team training—forcing hospitals to balance budgets, OR capacity, and learning curves. Meanwhile, BPH surgery is intensely competitive, with TURP, HoLEP, thermal ablation options, and implant-based approaches embedded in existing practice and procurement. Coverage and positioning can still vary across payers and geographies, so adoption often hinges on aligning clinical evidence, cost structure, and pathway efficiency into a coherent value proposition.

Demand is shifting from “choosing a procedure” to “choosing outcomes and experience.” Providers increasingly focus on predictable symptom relief, recovery pathways, and durability, integrating Aquablation into standardized perioperative care. A growing clinical evidence base—including durability signals in larger glands—supports broader applicability and routine stocking beyond early-adopter centers. With Category I CPT now effective and guideline/payer positions becoming clearer, diffusion is likely to expand from high-volume centers toward regional hospitals and ambulatory pathways, following a familiar curve of capital placement, consumable growth, and standardized training/follow-up.

Upstream structure is a hybrid chain of capital equipment, single-use procedural components, and sterile fluidics. The platform includes a high-pressure pump and fluid control, robotic actuation, endoscopic visualization, TRUS-related hardware, and planning software; disposables cover handpiece/tubing sets, seals/connectors, medical-grade polymers and metals, sterile packaging, and validated sterilization—using sterile saline as the cutting medium. Because performance is highly sensitive to fluid stability, device consistency, and sterility assurance, supplier capability in precision fluidic manufacturing, traceability, assembly reproducibility, software/hardware reliability, and end-to-end quality systems directly shapes OR efficiency, failure risk, and long-term reputation.

This report studies the global Aquablation Therapy demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Aquablation Therapy, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Aquablation Therapy that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Aquablation Therapy total market, 2021-2032, (USD Million)

Global Aquablation Therapy total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Aquablation Therapy total market, key domestic companies, and share, (USD Million)

Global Aquablation Therapy revenue by player, revenue and market share 2021-2026, (USD Million)

Global Aquablation Therapy total market by Type, CAGR, 2021-2032, (USD Million)

Global Aquablation Therapy total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Aquablation Therapy market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include PROCEPT BioRobotics, Medtronic, Olympus, Boston Scientific, Karl Storz, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Aquablation Therapy market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Aquablation Therapy Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Aquablation Therapy Market, Segmentation by Type:

Aquablation Consoles

Single-use Handpieces

Imaging & Planning Software

Global Aquablation Therapy Market, Segmentation by Anesthesia Type:

General Anesthesia

Spinal Anesthesia

Other

Global Aquablation Therapy Market, Segmentation by Site of Care:

Inpatient OR

Ambulatory Surgery Center

Other

Global Aquablation Therapy Market, Segmentation by Application:

Benign Prostatic Hyperplasia (BPH)

Prostate Tissue Debulking

Other

Companies Profiled:

PROCEPT BioRobotics

Medtronic

Olympus

Boston Scientific

Karl Storz

Key Questions Answered

1. How big is the global Aquablation Therapy market?
2. What is the demand of the global Aquablation Therapy market?
3. What is the year over year growth of the global Aquablation Therapy market?
4. What is the total value of the global Aquablation Therapy market?
5. Who are the Major Players in the global Aquablation Therapy market?
6. What are the growth factors driving the market demand?

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