

Kidney Stone Retrieval Devices Market Size, Share & Trends Analysis Report By Product Type (Lithotripters, Stone Removal Baskets, Ureterorenoscopes, Ureteral Stents), By Treatment, By End-use, By Region, And Segment Forecasts, 2022 - 2030

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Abstracts

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Kidney Stone Retrieval Devices Market Growth & Trends

The global kidney stone retrieval devices market size is expected to reach USD 3.69 billion by 2030, based on a new report by Grand View Research, Inc., expanding at a CAGR of 3.7% from 2022 to 2030. Kidney stone retrieval devices are used in minimally invasive or non-invasive treatment options for the removal of kidney stones. The rise in the incidence rate of kidney stones, technological advancements, and increased R&D investments are some of the factors fueling the growth of the global market.

Devices for retrieving kidney stones continue to advance incrementally. Considerably smaller ureter scopes, quartz fibers, and lithotripter probes have made the extraction of kidney stones from previously unreachable locations far safer than traditional surgical options. The potential for further apparatus miniaturization and optimization has expanded with the relatively recent advent of new technologies such as electromechanical and pneumatic impact lithotripsy. For instance, the Dretler stone cone is one innovation that inhibits stone migration during the treatment.

The COVID-19 pandemic affected the market due to the reduction in emergency room

visits, increased number of patients with acute renal injury, and significantly delayed outpatient clinic appointments. These changes resulted in a significant backlog in treatments due to a lack of hospital beds, anesthesia or procedural slots, and healthcare personnel. As a result, the market was negatively impacted as the number of patients seeking diagnosis and treatments dropped drastically. The demand for kidney stone retrieval devices was uneven, with installation delays and a decline in manufacturing during the pandemic. The COVID-19 pandemic has also affected the world's supply chain network, and market players such as Boston Corporation and BD reported delays or interruptions in the shipments of several materials or components that go into manufacturing products.

The organizations are incorporating strategies such as alliances, acquisitions and partnerships, R&D investments, new product launches, and approvals to strengthen their competitive power while expanding their global reach. For instance, in June 2020, Olympus launched the Soltive SuperPulsed Laser System (Soltive Laser System), a novel application of thulium fiber laser technology intended for soft tissue and stone lithotripsy applications.

Kidney Stone Retrieval Devices Market Report Highlights

Based on product type, the lithotripters segment dominated the market with a revenue share of over 30.0% in 2021 owing to the increased adoption of treating kidney stones effectively. Moreover, an increase in minimally invasive treatments is contributing to the growing demand for lithotripters

The ureterorenoscopes product type segment is expected to exhibit the fastest CAGR of 5.2% during the forecast period as it is gaining popularity among healthcare professionals due to the decreased downtime caused by damaged equipment, consequently reducing treatment delays

Based on treatment, the Extracorporeal Shock Wave Lithotripsy (ESWL) segment dominated the market in 2021 with a revenue share of over 40.0% owing to the increasing recurrence rate of kidney stones and growing demand for minimally invasive treatments. The less invasive ESWL procedure is frequently preferred as there are normally no scopes put into the urinary tract and no stents are implanted

The intracorporeal ureteroscopy treatment segment is likely to exhibit the fastest CAGR of 5.0% during the forecast period as this procedure is typically preferred

due to its advantages in stone-free results and the fineness it offers

The hospitals and clinics end-use segment held the largest revenue share of over 50.0% in 2021 and is expected to retain its dominance during the forecast period

North America held the largest revenue share of over 40.0% in 2021 owing to the increasing prevalence of kidney stone cases, the adoption of minimally invasive techniques, increased competition among market players, and significant expenditure on research and development to introduce technologies

Asia Pacific is expected to register the fastest growth rate of 5.6% from 2022 to 2030 due to the rapidly expanding healthcare infrastructure and growing government backing

Mergers acquisitions, agreements, and expansions are the key strategies adopted by the companies over the past years. For instance, in October 2021, Boston Scientific entered into an agreement with Baylis Medical Company Inc. to acquire it by paying USD 1.75 billion. Baylis Medical Company Inc. offers products and services such as advanced transseptal access solutions, guidewires, dilators, and sheaths

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