

Urolithiasis Management Devices Market Analysis By Treatment Type (Extracorporeal Shock Wave Lithotripsy (Eswl), Intracorporeal Lithotripsy, Percutaneous Nephrolithotomy, Other Treatments (Watchful Waiting, Parathyroid Gland Surgery)), By End Use (Hospitals & Clinics, Ambulatory Surgical Centers), And Segment Forecasts To 2024

<https://marketpublishers.com/r/U331C0621CBEN.html>

Date: October 2016

Pages: 115

Price: US\$ 5,950.00 (Single User License)

ID: U331C0621CBEN

Abstracts

The global urolithiasis management devices market was valued at USD 1.27 billion in 2015 and is expected to be valued at USD 1.93 billion by 2024. The alarming growth in the incidence rate of urinary stones, over the years, is responsible for the advancements in the treatment options. European Association of Urology states that it is one of the most common lifestyle disorders with a 10% prevalence rate and requires a systematic treatment approach.

Urolithiasis means formation of stones in the urinary system, mainly including the kidney, ureters, and the bladder. It is a major healthcare concern in the high end countries such as the U.S., Canada, and Germany with a recurrence rate of 50% in most of the cases. Urolithiasis can be managed with the help of lifestyle changes, controlled diet, or basic medication. However, various treatment approaches need to be adopted for the removal of large stones that cause severe pain. Depending upon the stone size, location in the body, and anatomical variations in the urogenital tract, invasive or noninvasive stone removal procedures are available. For instance, smaller stones can be tackled with external shock waves (extracorporeal shock wave lithotripsy), while larger stones can be removed through surgeries (intracorporeal lithotripsy or percutaneous nephrolithotomy).

Smaller stones generally do not require surgical interventions and can be cured with the help of medication and a healthy diet. However, larger stones necessitate different approaches for their elimination. Extracorporeal lithotripsy is one of the common treatments employed for stone elimination and held a majority market share in the year 2015. Intracorporeal lithotripsy treatments spot and reduce the stones to smaller pieces with the help of endoscopy. For the disintegration of stones, ultrasound or laser techniques are used to enable the passage of smaller fragments through the urinary system. Owing to the effective stone-free rate offered by intracorporeal lithotripsy, it is likely to be preferred as a treatment option during the forecast period.

Furthermore, percutaneous nephrolithotomy is a surgical approach deployed to eliminate larger stones where extracorporeal or intracorporeal lithotripsies prove to be ineffective and typically require a week's hospitalization.

Ambulatory surgical centers are gaining popularity over traditional hospital and clinic settings due to the time and cost saving benefits. As a result, this end-use segment is expected to record a lucrative growth rate during the forecast period. Introduction of novel surgical technologies, such as endoscopy and micro accessories including guidewires, scalpels, and baskets, to effectively expel stones from the urinary system in a short time has enhanced the overall acceptability of minimally invasive surgeries.

Further Key Findings from the Study Suggest:

Urinary stones are highly prevalent worldwide with a 15% global target population and the recurrence rate of 50%. Men are more susceptible to developing renal stones than women.

Adoption and acceptance of intracorporeal lithotripsy contributed to more than 95% stone-free rate, which will render it the most preferred alternative over extracorporeal and subcutaneous treatments. On the other hand, ambulatory surgical centers will grow at a higher rate due to the associated benefits of lower cost and shorter perioperative time.

The upward trend in the adoption of sedentary lifestyle coupled with increased consumption of unhealthy food in the developed countries is responsible for the rising incidence of kidney stones. Ambulatory surgical service providers are expected to experience a surge in the treatment demand as a result of the unhealthy lifestyle changes, especially in the developed countries.

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