

U.S. Ureteral Access Sheath Market Size, Share & Trends Analysis Report By Product Type (Standard, Reinforced, Dual-Lumen), By Clinical Indication, By Age Group, By Size, By End-use (Hospitals, Specialty Clinics, Diagnostic Centers), And Segment Forecasts, 2026 - 2033

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Abstracts

The U.S. ureteral access sheath market size was estimated at USD 160.34 million in 2025 and is projected to reach USD 266.19 million by 2033, growing at a CAGR of 6.5% from 2026 to 2033. The market is primarily driven by the rising prevalence of urolithiasis and other urological disorders, which have increased the volume of ureteroscopy procedures in the U.S.

The growing adoption of minimally invasive surgeries, coupled with technological advancements that improve procedural efficiency, safety, and reduce operative time, is further accelerating market growth. According to the National Kidney Foundation, more than 500,000 people visit emergency rooms each year due to kidney stones, highlighting the significant clinical burden of the condition. In nearly 1 in 10 individuals, a kidney stone is expected to develop at some point during their lifetime.

The U.S. ureteral access sheath market is experiencing significant growth, driven by the increasing prevalence of kidney stone disease and the widespread adoption of minimally invasive urological procedures. Ongoing innovations in sheath design and materials are improving procedural safety and efficiency, encouraging higher clinical adoption. In addition, strong healthcare infrastructure, favorable reimbursement policies, and the growing shift toward outpatient urology procedures continue to support the market expansion.

The AUA 2026 kidney stone surgery guideline is expected to support the growth of the U.S. ureteral access sheath market. Ureteroscopy (URS) is a key treatment that supports the use of ureteral access sheaths during URS procedures. The guideline recommends URS as a primary treatment option for many kidney and ureteral stones. It allows the use of ureteral access sheaths, including advanced suction-based designs, during URS, thereby increasing clinical adoption of UAS devices. The U.S. already performs a high and growing volume of stone surgeries, with ureteroscopy procedures rising significantly over the last decade, creating sustained procedural demand for access tools such as UAS.

The rising prevalence of urolithiasis is a key driver of growth in the ureteral access sheath market, as increasing stone cases directly increase the number of ureteroscopic procedures. Ureteral access sheaths are essential in stone management, enabling efficient scope exchanges and improved intrarenal pressure control. As kidney stone incidence continues to grow due to lifestyle and dietary changes, demand for advanced ureteral access devices is expected to increase significantly. According to the National Kidney Foundation, in 2025, approximately 1 in 10 people have experienced a kidney stone at some point in their lives. The condition is slightly more common among men, with about 11 out of every 100 affected, compared to around 9 out of every 100 women.

The growing adoption of minimally invasive urological procedures is a key driver of the ureteral access sheath market, as these techniques depend on safe and efficient ureteral access. Procedures such as ureteroscopy, retrograde intrarenal surgery (RIRS), and laser lithotripsy use access sheaths to facilitate smooth instrument exchange and improve intrarenal pressure control. The shift toward shorter hospital stays, reduced complications, and faster recovery continues to accelerate demand for ureteral access sheaths.

Technological advancements are significantly driving the ureteral access sheath market by improving procedural safety, efficiency, and clinical outcomes. Innovations such as enhanced flexible materials, hydrophilic coatings, pressure-controlled and dual-lumen designs reduce ureteral trauma and maintain optimal intrarenal pressure. These developments support wider adoption of ureteral access sheaths across complex and minimally invasive urological procedures.

For instance, in August 2025, the Journal of the Formosan Medical Association reported that urolithiasis remains a prevalent and economically burdensome condition worldwide, with a high recurrence rate. Advances in flexible ureteroscopes (fURS) and high-power

holmium laser (HPHL) technologies have broadened clinical indications, positioning retrograde intrarenal surgery (RIRS) as a preferred treatment for complex upper urinary tract stones. The introduction of flexible and navigable suction (FANS) ureteral access sheaths (UAS) has further improved outcomes by enabling effective intrarenal pressure control and high stone-free rates, with minimal serious adverse events. However, alongside these clinical benefits, the rising costs of disposable fURS and HPHL systems are emerging as a significant concern in contemporary stone management.

U.S. Ureteral Access Sheath Market Report Segmentation

This report forecasts revenue growth at country levels and provides an analysis on the latest industry trends and opportunities in each of the sub-segments from 2021 to 2033. For the purpose of this study, Grand View Research has segmented the U.S. ureteral access sheath market report on the basis of product type, size, age group, clinical indication, and end-use:

Product Type Outlook (Revenue, USD Million, 2021 - 2033)

Standard (Single-Lumen)

Reinforced

Dual Lumen

Size Outlook (Revenue, USD Million, 2021 - 2033)

<10

10 to 12

More than or equal to 13 - 15

Age Group Outlook (Revenue, USD Million, 2021 - 2033)

Adult

Pediatric

Clinical Indication Outlook (Revenue, USD Million, 2021 - 2033)

Stone Management

Others

End-use Outlook (Revenue, USD Million, 2021 - 2033)

Hospitals

Specialty Clinics

Diagnostic Centers

ASCs

Others

This report can be delivered to the clients within 3 Business Days

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