

Ureteral Stents Market Report by Product Type (Open-End Stents, Closed-End Stents, Double J-Stent, Multiloop Stents), Material (Metallic Ureteral Stents, Polymer Ureteral Stents), Application (Kidney Stones, Kidney Transplantation, Tumors, Urinary Incontinence, and Others), End Use (Hospitals and Clinics, Ambulatory Surgical Centers (ASCs), and Others), and Region 2023-2028

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Abstracts

The global ureteral stents market size reached US\$ 353.4 Million in 2022. Looking forward, IMARC Group expects the market to reach US\$ 504.1 Million by 2028, exhibiting a growth rate (CAGR) of 6.1% during 2022-2028. The growing prevalence of urological disorders, emerging technological advances in stent technology, and the implementation of favorable government policies encouraging the adoption of ureteral stents are some of the major factors contributing to the market growth.

A ureteral stent is a small, flexible tube produced of medical-grade materials, such as silicone or polyurethane, used in urology to manage various urinary tract conditions. It is inserted into the ureter, the tube connecting the kidney to the bladder. It serves various purposes, including relieving obstruction, facilitating healing, and draining the kidney. It alleviates blockages in the ureter caused by kidney stones, tumors, or other obstructions. It keeps the ureter open, allowing urine to rush freely from the kidney to the bladder, preventing complications. Additionally, it is temporary, requires periodic monitoring and removal, and is essential in urological care, ensuring the health and functionality of the urinary system.

The market is primarily driven by the technological advancements in urology. In addition, the development of more effective and minimally invasive ureteral stent

devices is influencing the market growth. Also, modern stents offer improved biocompatibility, reduced encrustation, and enhanced patient comfort. As a result, healthcare professionals are more inclined to recommend and utilize these advanced stents, driving the market growth. Moreover, the rising incidences of urological disorders such as kidney stones, urinary tract infections (UTI), and ureteral strictures are accelerating product adoption. These conditions often require the insertion of ureteral stents as part of their treatment. Besides this, the growing geriatric population susceptible to urological issues contributes to market growth. Along with this, the rising awareness about urological disorders and their treatment options led to earlier diagnosis and intervention, allowing patients to seek medical advice and treatment and propelling the market growth.

Ureteral Stents Market Trends/Drivers:

The growing prevalence of urological disorders

The market has witnessed a significant impact due to the growing incidences of urological disorders. In addition, the increasing number of kidney stones, is a common urological condition characterized by the formation of solid masses in the kidney or urinary tract that obstruct the ureter, causing severe pain and potential kidney damage is influencing the market growth. Also, the increasing use of ureteral stents in such cases to relieve obstruction and promote urine flow, offering patients relief while avoiding more invasive procedures is augmenting the market growth. Moreover, the growing geriatric population is more susceptible to urological disorders, including urinary tract infections, bladder issues, and benign prostatic hyperplasia (BPH). These conditions can lead to ureteral obstructions or complications, requiring the use of stents for diagnostic and therapeutic purposes. Furthermore, the improved awareness of urological disorders and advancements in diagnostic techniques led to early detection and intervention, which is accelerating the product adoption.

The emerging technological advances in stents

The market is driven by significant advancements and innovations improving the effectiveness of ureteral stents and enhancing patient comfort and outcomes. In addition, traditional stents are typically produced from non-biodegradable materials, requiring a second procedure for removal. It led to the adoption of biodegradable stents, gradually dissolving within the body over time, eliminating the need for removal procedures and reducing patient discomfort. Moreover, the incorporation of drug-eluting technology, stents coated with medications that can be slowly released into the ureter, helping to prevent complications such as inflammation or infections which minimizes side effects and enhances the stent's therapeutic effect representing another major growth-inducing factor. Besides this, the integration of three-dimensional (3D) printing technology transforms stent design and allows for the creation of custom-made stents tailored to a patient's unique anatomy which ensures a better fit, reducing irritation and

discomfort, accelerating the market growth.

The implementation of favorable government policies

The implementation of favorable government policies encouraging the adoption of ureteral stents is influencing the market growth. These policies are improving healthcare accessibility, patient outcomes, and cost-effectiveness. In addition, government initiatives include awareness campaigns and subsidized healthcare programs, making stents accessible to patients, allowing early diagnosis and treatment of urological conditions which is influencing the market growth. Moreover, several favorable policies can provide financial incentives and grants for research and development (R&D) in the medical device sector, representing another major growth-inducing factor. Also, companies are investing in developing advanced stents that are more effective, comfortable, and minimally invasive, which is augmenting the market growth. Besides this, government initiatives are encouraging new market players to enter the market leading to numerous stent options, catering to several patient needs and preferences, thus accelerating the market growth.

Ureteral Stents Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional and country levels from 2023-2028. Our report has categorized the market based on product type, material, application and end use.

Breakup by Product Type:

Open End Stents

Closed End Stents

Double J-Stent

Multiloop Stents

Double J-stent represents the most popular product type

The report has provided a detailed breakup and analysis of the market based on the product type. This includes open-end stents, closed-end stents, double j-stent, and multiloop stents. According to the report, double j-stent accounted for the largest market share.

The double J-stent, also known as a double-pigtail stent, is a specialized product design characterized by its unique shape, which resembles the letter J with two curled ends. In addition, the double J-stent shape is optimized for stability and efficacy while the curled ends serve as anchors, securing the stent in place within the ureter, and influencing the market growth. It minimizes the risk of migration, where the stent may shift or dislodge from its intended position and ensures that the stent effectively facilitates urine drainage from the kidney to the bladder, preventing complications associated with ureteral obstructions.

Moreover, the double-pigtail shape reduces irritation and discomfort for patients and

with improved patient comfort contributes to greater patient compliance and satisfaction, augmenting the market growth.

Besides this, the double J-stent is employed in clinical scenarios, from managing kidney stones and post-operative care to treating ureteral strictures which makes it a preferred choice for urologists and healthcare providers facing several patient needs.

Breakup by Material:

Metallic Ureteral Stents

Polymer Ureteral Stents

Silicone Stents

Polyurethane Stents

Hybrid Stents

Polymer ureteral stents presently account for the largest market share

A detailed breakup and analysis of the market based on the material has also been provided in the report. This includes metallic ureteral stents, polymer ureteral stents (silicone stents, polyurethane stents, and hybrid stents. According to the report, polymer ureteral stents accounted for the largest market share.

Polymer ureteral stents offer excellent biocompatibility and are well-tolerated by the body, minimizing the risk of allergic reactions or adverse tissue responses which makes them suitable for numerous patients, including those with sensitivities to other materials. Moreover, polymer stents are highly flexible and can conform to the natural curvature of the ureter, allowing for a more comfortable placement procedure and reducing the risk of stent migration or discomfort for the patient which enables a better fit within the urinary tract, reducing the chances of irritation or obstruction.

Additionally, polymer ureteral stents are available in various sizes and configurations to cater to individual patient needs which ensures that urologists can select the most appropriate stent for each case, considering factors including the patient's anatomy and the specific urological condition.

Breakup by Application:

Kidney Stones

Kidney Transplantation

Tumors

Urinary Incontinence

Others

Kidney stones represent the largest market segment

A detailed breakup and analysis of the market based on the application have also been provided in the report. This includes kidney stones, kidney transplantation, tumors, urinary incontinence, and others. According to the report, kidney stones accounted for the largest market share.

Kidney stones, medically known as nephrolithiasis or renal calculi, are a widespread

urological issue affecting millions of individuals. These small, hard mineral and salt deposits can form in the kidneys and, when they move into the ureter, cause excruciating pain and block urine flow. In addition, the rising product demand for alleviating pain and facilitating the passage of kidney stones by inserting a stent into the ureter to act as a conduit, keeping the ureter open, and allowing the stone to pass more comfortably is influencing the market growth. It reduces pain and minimizes the risk of complications such as infection or kidney damage associated with prolonged blockage. Additionally, the prevalence of kidney stones due to dietary habits, dehydration, and lifestyle choices is escalating the product demand for kidney stone management, contributing to the market growth.

Moreover, advancements in stent technology improved the efficacy of stents in this application with the development of biodegradable stents, drug-eluting stents, and 3D-printed stents which are more patient-friendly and effective in facilitating the passage of kidney stones, representing another major growth-inducing factor.

Breakup by End Use:

Hospitals and Clinics

Ambulatory Surgical Centers (ASCs)

Others

Hospitals and clinics dominate the market

A detailed breakup and analysis of the market based on the end use has also been provided in the report. This includes hospitals and clinics, ambulatory surgical centers (ASCs), and others. According to the report, hospitals and clinics accounted for the largest market share.

Hospitals and clinics serve as primary points of care for patients with urological issues. In addition, hospitals are equipped with advanced medical facilities and expert urologists, are well-positioned to provide comprehensive care, including the insertion and monitoring of stents, contributing to the market growth.

Moreover, hospitals and clinics have the infrastructure and expertise to perform complex urological procedures, such as the insertion and removal of stents which often require specialized equipment and highly trained medical staff that hospitals and clinics can easily provide, representing another major growth-inducing factor.

Apart from this, the availability of numerous stent types and sizes is essential in addressing several needs of patients. Hospitals and clinics typically maintain a comprehensive inventory of ureteral stents, allowing them to select the most appropriate stent for each patient's specific condition and anatomy.

Breakup by Region:

North America

United States

Canada

Asia-Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

North America leads the market, accounting for the majority of ureteral stents market. The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America was the largest market.

The North America market is driven by the well-established healthcare infrastructure that promotes innovation and research. It offers world-renowned medical institutions, research centers, and urological experts which fosters a culture of continuous improvement, leading to the development and adoption of advanced technologies and treatments, including ureteral stents.

Moreover, the strong emphasis on patient care and comfort among healthcare providers aligning with the advancements in stent technology to enhance patient outcomes, represents another major growth-inducing factor. Patients in North America have access to the latest and most advanced medical treatments and devices, including advanced stents.

Along with this, North America's implementation of an enhanced regulatory framework

ensures the safety and efficacy of medical devices, including ureteral stents, instilling confidence in healthcare professionals and patients regarding the reliability and performance of the products available in the market, propelling the market growth.

Competitive Landscape:

At present, key players in the market are actively implementing strategies to strengthen their positions and remain competitive in this dynamic healthcare segment. These strategies encompass various aspects, including innovation, partnerships, market expansion, and customer-centric approaches. They are investing in research and development (R&D) to create next-generation products including developing stents with advanced materials, drug-eluting capabilities, and improved designs to enhance patient comfort and reduce complications. Innovations such as smart stents with monitoring capabilities are also on the horizon. Moreover, several companies are entering strategic partnerships and collaborations with healthcare providers, research institutions, and academic centers which facilitate clinical trials, provide access to real-world patient data, and support the development of evidence-based solutions. Furthermore, key players are recognizing the importance of healthcare professionals and patients and focusing on customer-centric strategies involving comprehensive support services, including training for healthcare providers, educational resources for patients, and responsive customer service.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Allium Medical Solutions Ltd.
B. Braun Melsungen AG
Biomerics
Boston Scientific Corporation
Becton, Dickinson and Company
Coloplast Ltd.
Cook Group Incorporated
Medline Industries Inc.
Merit Medical Systems Inc.
Olympus Corporation
Teleflex Incorporated

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Recent Developments:

In June 2022, Boston Scientific Corporation was recognized with a Bronze Edison Award in the Science and Medical category for its Tria Ureteral Stent, which is the first stent produced with a proprietary surface technology developed to offer protection

against the accumulation of urine calcium and magnesium salt deposits.

In October 2020, Allium Medical Solutions Ltd., which specializes in minimally invasive technologies offer large markets with innovative solutions for clinical needs, announced that its urological stents received CE Mark for a new indication for treating urethral fistula after a successful trial.

In February 2023, Olympus Corporation, a global medtech company announced the acquisition of Taewoong Medical Co., Ltd, (Taewoong Medical), a Korea-based manufacturer of medical devices such as gastrointestinal (GI) metallic stents¹ to strengthen its GI EndoTherapy product portfolio capabilities, enhancing patient outcome through comprehensive solutions.

Key Questions Answered in This Report

1. What was the size of the global ureteral stents market in 2022?
2. What is the expected growth rate of the global ureteral stents market during 2023-2028?
3. What has been the impact of COVID-19 on the global ureteral stents market?
4. What are the key factors driving the global ureteral stents market?
5. What is the breakup of the global ureteral stents market based on the product type?
6. What is the breakup of the global ureteral stents market based on the material?
7. What is the breakup of the global ureteral stents market based on the application?
8. What is the breakup of the global ureteral stents market based on the end use?
9. What are the key regions in the global ureteral stents market?
10. Who are the key players/companies in the global ureteral stents market?

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