

Global Hybrid Thulium Laser Treatment Device Market Growth 2026-2032

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Abstracts

The global Hybrid Thulium Laser Treatment Device market size is predicted to grow from US\$ 86.89 million in 2025 to US\$ 228 million in 2032; it is expected to grow at a CAGR of 15.1% from 2026 to 2032.

Recently, lasers have made greater progress in the biomedical field, especially in minimally invasive surgery, due to their excellent inherent properties, collimation, and previous energy density. The role of lasers in biological tissues is mainly to utilize the laser biothermal effect, and lasers of different wavelengths and energies have different thermal effects on biological tissues. The hybrid thulium laser therapy device is a device laser with a rare earth element thulium as the gain medium. It can use high-energy, high-power laser beams to vaporize, carbonize, and coagulate tissues to achieve the purpose of surgical treatment. The product has an annual production of approximately 650 units, with an average price of approximately \$160K per unit.

The upstream of the Thulium Fiber Laser (TFL) device industry mainly involves the supply of rare-earth materials (particularly thulium oxide), optical fibers, semiconductor pump diodes, precision optical components, and cooling systems, which are essential for producing high-quality and stable laser output. These materials and components are typically provided by specialized manufacturers in the optics, materials science, and semiconductor industries. The downstream of the TFL market encompasses its applications across medical, industrial, and research fields ? most notably in urology (for laser lithotripsy), minimally invasive surgery, precision metal processing, additive manufacturing, and scientific instrumentation. As hospitals, surgical device makers, and advanced manufacturing sectors increasingly adopt fiber laser technologies for their high efficiency and precision, demand for TFL devices continues to grow, linking the upstream photonics supply chain closely with the expanding healthcare and industrial

innovation ecosystems.

The Thulium Fiber Laser (TFL) device is emerging as a next-generation technology in urology, particularly for lithotripsy and soft tissue surgery, offering significant advantages over traditional holmium:YAG lasers. Its superior energy efficiency, higher frequency, and smaller fiber diameter enable faster stone dusting, reduced retropulsion, and smoother surgical precision, resulting in shorter operation times and improved patient outcomes. From a market perspective, adoption is being driven by the growing clinical preference for minimally invasive procedures, advancements in fiber optics and laser modulation, and the push toward compact, energy-efficient medical systems. Hospitals and surgical centers are increasingly replacing legacy laser platforms with TFL systems to enhance procedural efficiency and versatility, while manufacturers are expanding product portfolios and clinical validation studies to strengthen acceptance among urologists. The ongoing technological shift toward Thulium Fiber Lasers signals a broader trend of innovation and precision within laser-based surgical solutions.

LP Information, Inc. (LPI) ' newest research report, the "Hybrid Thulium Laser Treatment Device Industry Forecast" looks at past sales and reviews total world Hybrid Thulium Laser Treatment Device sales in 2025, providing a comprehensive analysis by region and market sector of projected Hybrid Thulium Laser Treatment Device sales for 2026 through 2032. With Hybrid Thulium Laser Treatment Device sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Hybrid Thulium Laser Treatment Device industry.

This Insight Report provides a comprehensive analysis of the global Hybrid Thulium Laser Treatment Device landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Hybrid Thulium Laser Treatment Device portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Hybrid Thulium Laser Treatment Device market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Hybrid Thulium Laser Treatment Device and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Hybrid Thulium Laser

Treatment Device.

This report presents a comprehensive overview, market shares, and growth opportunities of Hybrid Thulium Laser Treatment Device market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

High Power

Low Power

Segmentation by Laser Type:

Thulium-doped Fiber Lasers

Thulium-doped Solid-state Lasers

Segmentation by Surgery Type:

Shock Wave Lithotripsy (SWL)

Ureteroscopy

Percutaneous Nephrolithotomy (PCNL)

Traditional Surgery

Segmentation by Application:

Stone Management

BPH Treatment

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Quanta System

Olympus

OmniGuide (LISA Laser)

Electro Medical Systems (EMS)

IPG Photonics

Rocamed

Raykeen

Dornier MedTech

Coloplast

Potent

Rhein Laser

Richard-Wolf

Biolitec

Key Questions Addressed in this Report

What is the 10-year outlook for the global Hybrid Thulium Laser Treatment Device market?

What factors are driving Hybrid Thulium Laser Treatment Device market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Hybrid Thulium Laser Treatment Device market opportunities vary by end market size?

How does Hybrid Thulium Laser Treatment Device break out by Type, by Application?

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