

Global Kidney Stone Management Device Market Growth 2026-2032

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Abstracts

The global Kidney Stone Management Device market size is predicted to grow from US\$ 4124 million in 2025 to US\$ 7777 million in 2032; it is expected to grow at a CAGR of 9.6% from 2026 to 2032.

Kidney Stone Management Devices include extracorporeal shock wave lithotripsy (ESWL) systems, ureteroscopes, percutaneous nephrolithotomy (PCNL) equipment, laser lithotripters, stone retrieval tools, and related consumables used in minimally invasive urology. In 2025, the global average blended device value—including durable equipment, flexible scopes and consumables—is approximately US\$13,500 per unit, with worldwide shipments reaching about 312,000 units. Gross margin ranges from 32%–58%, depending on laser systems, flexible ureteroscopes, disposables and after-sales service. Upstream components include shock wave generators, fiber lasers, optics, CMOS imaging, steerable scopes and medical-grade polymers; midstream manufacturers provide assembly, sterilization compatibility, imaging integration and clinical validation; downstream users include hospitals, urology centers, ambulatory surgical centers, outpatient stone clinics and emergency departments dealing with acute renal colic.

Kidney stone management is rapidly shifting toward minimally invasive and disposable technologies. Flexible ureteroscopes and high-power pulsed lasers (Ho:YAG and new-generation Thulium Fiber Lasers) are replacing large ESWL systems in many markets. Growth is also driven by increasing stone recurrence rates and wider adoption of outpatient lithotripsy. Consumables—especially disposable ureteroscopes and laser fibers—will remain key drivers of revenue expansion through 2031.

LP Information, Inc. (LPI) ' newest research report, the “Kidney Stone Management

Device Industry Forecast” looks at past sales and reviews total world Kidney Stone Management Device sales in 2025, providing a comprehensive analysis by region and market sector of projected Kidney Stone Management Device sales for 2026 through 2032. With Kidney Stone Management Device sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Kidney Stone Management Device industry.

This Insight Report provides a comprehensive analysis of the global Kidney Stone Management 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 Kidney Stone Management Device portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Kidney Stone Management Device market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Kidney Stone Management 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 Kidney Stone Management Device.

This report presents a comprehensive overview, market shares, and growth opportunities of Kidney Stone Management Device market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Stone Crusher

Ureteroscopy

Ureteral Stent

Other

Segmentation by Surgical Pathway Classification:

Retrograde Approach Devices

Percutaneous Approach Devices

Extracorporeal Approach Devices

Segmentation by Energy Source:

Shock Wave Devices

Laser-Based Devices

Mechanical / Pneumatic Devices

Segmentation by Application:

Hospital

Ambulatory Surgery Center

Specialty Clinic

Other

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.

BD

Boston Scientific Corporation

Coloplast

Cook

DirexGroup

Dornier MedTech

EDAP TMS SA

EMS Urology

Olympus

Richard wolf GmbH

Storz Medical AG

Karl Storz Endoscopy

Key Questions Addressed in this Report

What is the 10-year outlook for the global Kidney Stone Management Device market?

What factors are driving Kidney Stone Management Device market growth, globally and by region?

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

How do Kidney Stone Management Device market opportunities vary by end market size?

How does Kidney Stone Management Device break out by Type, by Application?

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