

Kidney Stone Retrieval Devices Market Outlook 2025-2034: Market Share, and Growth Analysis By Product (Lithotripters, Stone Removal Baskets, Ureterorenoscopes, Ureteral Stents, Other Products), By Cause (Hypercalciuria, Diabetes, Osteoporosis, Obesity, Other Causes), By Treatment, By End-User

<https://marketpublishers.com/r/K3C3ACB96091EN.html>

Date: October 2025

Pages: 160

Price: US\$ 3,950.00 (Single User License)

ID: K3C3ACB96091EN

Abstracts

The Kidney Stone Retrieval Devices Market is valued at USD 3.6 billion in 2025 and is projected to grow at a CAGR of 5.5% to reach USD 5.8 billion by 2034. The Kidney Stone Retrieval Devices Market encompasses a range of minimally invasive tools and instruments designed to remove or manage nephrolithiasis, commonly known as kidney stones. These devices include stone baskets, graspers, lithotripters, stents, and ureteroscopes, which are used in endoscopic or extracorporeal procedures. The market is driven by rising global incidences of kidney stones, attributed to sedentary lifestyles, dietary imbalances, and inadequate hydration. Hospitals, urology clinics, and ambulatory surgical centers are the primary users of these devices, and technological advancements in flexible ureteroscopes and laser lithotripsy have significantly improved retrieval success rates. As patient preference shifts toward minimally invasive solutions with quicker recovery, the market continues to expand steadily. The kidney stone retrieval devices market witnessed accelerated innovation and adoption, especially in North America, Europe, and parts of Asia. Laser lithotripsy systems with integrated irrigation and visualization improved procedural accuracy, while disposable ureteroscopes reduced infection risks and reprocessing costs. Companies like Boston Scientific, Olympus, and Coloplast expanded product lines with enhanced stone baskets and tipless designs for better access to challenging anatomy. Recurrent stone formation prompted urologists to prefer stent placements with anti-encrustation coatings. Healthcare systems in India, China, and Brazil increased procurement of retrieval tools

as procedural volumes rose in response to better awareness and reimbursement policies for urological interventions. The kidney stone retrieval devices market is expected to benefit from AI-driven image guidance, robotic-assisted urology platforms, and digital integration with patient monitoring systems. New developments in bioresorbable stents, precision-guided lithotripsy, and microendoscopic retrieval tools will further enhance treatment efficacy and patient comfort. Preventive care programs and personalized urology approaches may reduce recurrence and fuel demand for early-stage retrieval solutions. As outpatient procedures become more common and the global burden of kidney stones rises, the market will evolve toward safer, faster, and more cost-effective retrieval options that blend clinical precision with patient-centered design.

Key Insights Kidney Stone Retrieval Devices Market

OG Analysis notes a rising trend in the adoption of single-use flexible ureteroscopes, offering infection control benefits and eliminating the need for complex sterilization processes in high-volume centers.

Integration of laser lithotripsy with enhanced irrigation and suction mechanisms is trending, allowing for more efficient stone fragmentation and removal during minimally invasive procedures.

According to OG Analysis, tipless nitinol baskets are trending due to their flexibility and reduced risk of ureteral trauma when retrieving stones from delicate or hard-to-reach locations.

Stents with antimicrobial or anti-encrustation coatings are trending, as they help reduce complications and discomfort during post-operative recovery from stone removal procedures.

Remote training modules and augmented reality (AR) simulations are trending among device manufacturers and hospitals to enhance urologist proficiency in using advanced retrieval tools.

OG Analysis highlights the global rise in kidney stone prevalence—linked to dietary habits, obesity, and dehydration—as a fundamental driver increasing demand for retrieval procedures and devices.

Growing preference for minimally invasive procedures and outpatient care

models is accelerating the adoption of compact and user-friendly kidney stone retrieval tools, says OG Analysis.

OG Analysis notes that advancements in endoscopic technology and laser lithotripsy are enabling more efficient stone removal, encouraging broader utilization across diverse care settings.

Expanding reimbursement policies and awareness campaigns about urological health are supporting procedure volumes and device demand in developing regions.

OG Analysis highlights cost barriers and limited access to high-end retrieval equipment in rural or underfunded healthcare facilities, restricting the availability of modern treatment options.

According to OG Analysis, device-related complications such as ureteral injury or stent discomfort remain concerns, requiring continuous innovation and clinician training to mitigate procedural risks.

Kidney Stone Retrieval Devices Market Segmentation

By Product

Lithotripters

Stone Removal Baskets

Ureterorenoscopes

Ureteral Stents

Other Products

By Cause

Hypercalciuria

Diabetes

Osteoporosis

Obesity

Other Causes

By Treatment

Extracorporeal Shock Wave Lithotripsy

Percutaneous Nephrolithotripsy

Intracorporeal Ureteroscopy

By End-User

Hospitals And Clinics

Ambulatory Surgery Centers

Specialty Clinics

Key Companies Analysed

Siemens Healthineers AG

Becton Dickinson and Company

Stryker Corporation

Quanta System

Boston Scientific Corporation

Olympus Corporation

C.R. Bard Inc.

Coloplast Corp.

Cook Medical LLC

Renishaw plc

Lumenis

Richard Wolf GmbH

Pentax Medical

Dornier MedTech GmbH

EDAP TMS

Shenzhen Huikang Medical Apparatus Co. Ltd.

Storz Medical AG

Allengers Medical Systems Limited

DirexGroup

Medispec Ltd.

Convergent Laser Technologies

TaeWoong Medical Co. Ltd.

NOVAmedtek

Pro-Med (Pro-Med Instruments)

Walz Elektronik GmbH

Elmed Medical Systems Inc

Inceler Medikal

Karl Storz SE & Co. KG.

Kidney Stone Retrieval Devices Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

Kidney Stone Retrieval Devices Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — Kidney Stone Retrieval Devices market data and outlook to 2034

United States

Canada

Mexico

Europe — Kidney Stone Retrieval Devices market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Kidney Stone Retrieval Devices market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Kidney Stone Retrieval Devices market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Kidney Stone Retrieval Devices market data and outlook to 2034

Brazil

Argentina

Chile

Peru

** We can include data and analysis of additional countries on demand.*

Research Methodology

This study combines primary inputs from industry experts across the Kidney Stone Retrieval Devices value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the Kidney Stone Retrieval Devices industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the Kidney Stone Retrieval Devices Market Report

Global Kidney Stone Retrieval Devices market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Kidney Stone Retrieval Devices trade, costs, and supply chains

Kidney Stone Retrieval Devices market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Kidney Stone Retrieval Devices market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Kidney Stone Retrieval Devices market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and Kidney Stone Retrieval Devices supply chain analysis

Kidney Stone Retrieval Devices trade analysis, Kidney Stone Retrieval Devices market price analysis, and Kidney Stone Retrieval Devices supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Kidney Stone Retrieval Devices market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

** The updated report will be delivered within 3 working days*

Contents

1. TABLE OF CONTENTS

- 1.1 List of Tables
- 1.2 List of Figures

2. GLOBAL KIDNEY STONE RETRIEVAL DEVICES MARKET SUMMARY, 2025

- 2.1 Kidney Stone Retrieval Devices Industry Overview
 - 2.1.1 Global Kidney Stone Retrieval Devices Market Revenues (In US\$ billion)
- 2.2 Kidney Stone Retrieval Devices Market Scope
- 2.3 Research Methodology

3. KIDNEY STONE RETRIEVAL DEVICES MARKET INSIGHTS, 2024-2034

- 3.1 Kidney Stone Retrieval Devices Market Drivers
- 3.2 Kidney Stone Retrieval Devices Market Restraints
- 3.3 Kidney Stone Retrieval Devices Market Opportunities
- 3.4 Kidney Stone Retrieval Devices Market Challenges
- 3.5 Tariff Impact on Global Kidney Stone Retrieval Devices Supply Chain Patterns

4. KIDNEY STONE RETRIEVAL DEVICES MARKET ANALYTICS

- 4.1 Kidney Stone Retrieval Devices Market Size and Share, Key Products, 2025 Vs 2034
- 4.2 Kidney Stone Retrieval Devices Market Size and Share, Dominant Applications, 2025 Vs 2034
- 4.3 Kidney Stone Retrieval Devices Market Size and Share, Leading End Uses, 2025 Vs 2034
- 4.4 Kidney Stone Retrieval Devices Market Size and Share, High Growth Countries, 2025 Vs 2034
- 4.5 Five Forces Analysis for Global Kidney Stone Retrieval Devices Market
 - 4.5.1 Kidney Stone Retrieval Devices Industry Attractiveness Index, 2025
 - 4.5.2 Kidney Stone Retrieval Devices Supplier Intelligence
 - 4.5.3 Kidney Stone Retrieval Devices Buyer Intelligence
 - 4.5.4 Kidney Stone Retrieval Devices Competition Intelligence
 - 4.5.5 Kidney Stone Retrieval Devices Product Alternatives and Substitutes Intelligence
 - 4.5.6 Kidney Stone Retrieval Devices Market Entry Intelligence

5. GLOBAL KIDNEY STONE RETRIEVAL DEVICES MARKET STATISTICS – INDUSTRY REVENUE, MARKET SHARE, GROWTH TRENDS AND FORECAST BY SEGMENTS, TO 2034

5.1 World Kidney Stone Retrieval Devices Market Size, Potential and Growth Outlook, 2024- 2034 (\$ billion)

5.1 Global Kidney Stone Retrieval Devices Sales Outlook and CAGR Growth By Product, 2024- 2034 (\$ billion)

5.2 Global Kidney Stone Retrieval Devices Sales Outlook and CAGR Growth By Cause, 2024- 2034 (\$ billion)

5.3 Global Kidney Stone Retrieval Devices Sales Outlook and CAGR Growth By Treatment, 2024- 2034 (\$ billion)

5.4 Global Kidney Stone Retrieval Devices Sales Outlook and CAGR Growth By End-User, 2024- 2034 (\$ billion)

5.5 Global Kidney Stone Retrieval Devices Market Sales Outlook and Growth by Region, 2024- 2034 (\$ billion)

6. ASIA PACIFIC KIDNEY STONE RETRIEVAL DEVICES INDUSTRY STATISTICS – MARKET SIZE, SHARE, COMPETITION AND OUTLOOK

6.1 Asia Pacific Kidney Stone Retrieval Devices Market Insights, 2025

6.2 Asia Pacific Kidney Stone Retrieval Devices Market Revenue Forecast By Product, 2024- 2034 (USD billion)

6.3 Asia Pacific Kidney Stone Retrieval Devices Market Revenue Forecast By Cause, 2024- 2034 (USD billion)

6.4 Asia Pacific Kidney Stone Retrieval Devices Market Revenue Forecast By Treatment, 2024- 2034 (USD billion)

6.5 Asia Pacific Kidney Stone Retrieval Devices Market Revenue Forecast By End-User, 2024- 2034 (USD billion)

6.6 Asia Pacific Kidney Stone Retrieval Devices Market Revenue Forecast by Country, 2024- 2034 (USD billion)

6.6.1 China Kidney Stone Retrieval Devices Market Size, Opportunities, Growth 2024-2034

6.6.2 India Kidney Stone Retrieval Devices Market Size, Opportunities, Growth 2024-2034

6.6.3 Japan Kidney Stone Retrieval Devices Market Size, Opportunities, Growth 2024-2034

6.6.4 Australia Kidney Stone Retrieval Devices Market Size, Opportunities, Growth

2024- 2034

7. EUROPE KIDNEY STONE RETRIEVAL DEVICES MARKET DATA, PENETRATION, AND BUSINESS PROSPECTS TO 2034

7.1 Europe Kidney Stone Retrieval Devices Market Key Findings, 2025

7.2 Europe Kidney Stone Retrieval Devices Market Size and Percentage Breakdown By Product, 2024- 2034 (USD billion)

7.3 Europe Kidney Stone Retrieval Devices Market Size and Percentage Breakdown By Cause, 2024- 2034 (USD billion)

7.4 Europe Kidney Stone Retrieval Devices Market Size and Percentage Breakdown By Treatment, 2024- 2034 (USD billion)

7.5 Europe Kidney Stone Retrieval Devices Market Size and Percentage Breakdown By End-User, 2024- 2034 (USD billion)

7.6 Europe Kidney Stone Retrieval Devices Market Size and Percentage Breakdown by Country, 2024- 2034 (USD billion)

7.6.1 Germany Kidney Stone Retrieval Devices Market Size, Trends, Growth Outlook to 2034

7.6.2 United Kingdom Kidney Stone Retrieval Devices Market Size, Trends, Growth Outlook to 2034

7.6.2 France Kidney Stone Retrieval Devices Market Size, Trends, Growth Outlook to 2034

7.6.2 Italy Kidney Stone Retrieval Devices Market Size, Trends, Growth Outlook to 2034

7.6.2 Spain Kidney Stone Retrieval Devices Market Size, Trends, Growth Outlook to 2034

8. NORTH AMERICA KIDNEY STONE RETRIEVAL DEVICES MARKET SIZE, GROWTH TRENDS, AND FUTURE PROSPECTS TO 2034

8.1 North America Snapshot, 2025

8.2 North America Kidney Stone Retrieval Devices Market Analysis and Outlook By Product, 2024- 2034 (\$ billion)

8.3 North America Kidney Stone Retrieval Devices Market Analysis and Outlook By Cause, 2024- 2034 (\$ billion)

8.4 North America Kidney Stone Retrieval Devices Market Analysis and Outlook By Treatment, 2024- 2034 (\$ billion)

8.5 North America Kidney Stone Retrieval Devices Market Analysis and Outlook By End-User, 2024- 2034 (\$ billion)

8.6 North America Kidney Stone Retrieval Devices Market Analysis and Outlook by Country, 2024- 2034 (\$ billion)

8.6.1 United States Kidney Stone Retrieval Devices Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.6.1 Canada Kidney Stone Retrieval Devices Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.6.1 Mexico Kidney Stone Retrieval Devices Market Size, Share, Growth Trends and Forecast, 2024- 2034

9. SOUTH AND CENTRAL AMERICA KIDNEY STONE RETRIEVAL DEVICES MARKET DRIVERS, CHALLENGES, AND FUTURE PROSPECTS

9.1 Latin America Kidney Stone Retrieval Devices Market Data, 2025

9.2 Latin America Kidney Stone Retrieval Devices Market Future By Product, 2024- 2034 (\$ billion)

9.3 Latin America Kidney Stone Retrieval Devices Market Future By Cause, 2024- 2034 (\$ billion)

9.4 Latin America Kidney Stone Retrieval Devices Market Future By Treatment, 2024- 2034 (\$ billion)

9.5 Latin America Kidney Stone Retrieval Devices Market Future By End-User, 2024- 2034 (\$ billion)

9.6 Latin America Kidney Stone Retrieval Devices Market Future by Country, 2024- 2034 (\$ billion)

9.6.1 Brazil Kidney Stone Retrieval Devices Market Size, Share and Opportunities to 2034

9.6.2 Argentina Kidney Stone Retrieval Devices Market Size, Share and Opportunities to 2034

10. MIDDLE EAST AFRICA KIDNEY STONE RETRIEVAL DEVICES MARKET OUTLOOK AND GROWTH PROSPECTS

10.1 Middle East Africa Overview, 2025

10.2 Middle East Africa Kidney Stone Retrieval Devices Market Statistics By Product, 2024- 2034 (USD billion)

10.3 Middle East Africa Kidney Stone Retrieval Devices Market Statistics By Cause, 2024- 2034 (USD billion)

10.4 Middle East Africa Kidney Stone Retrieval Devices Market Statistics By Treatment, 2024- 2034 (USD billion)

10.5 Middle East Africa Kidney Stone Retrieval Devices Market Statistics By Treatment,

2024- 2034 (USD billion)

10.6 Middle East Africa Kidney Stone Retrieval Devices Market Statistics by Country, 2024- 2034 (USD billion)

10.6.1 Middle East Kidney Stone Retrieval Devices Market Value, Trends, Growth Forecasts to 2034

10.6.2 Africa Kidney Stone Retrieval Devices Market Value, Trends, Growth Forecasts to 2034

11. KIDNEY STONE RETRIEVAL DEVICES MARKET STRUCTURE AND COMPETITIVE LANDSCAPE

11.1 Key Companies in Kidney Stone Retrieval Devices Industry

11.2 Kidney Stone Retrieval Devices Business Overview

11.3 Kidney Stone Retrieval Devices Product Portfolio Analysis

11.4 Financial Analysis

11.5 SWOT Analysis

12 APPENDIX

12.1 Global Kidney Stone Retrieval Devices Market Volume (Tons)

12.1 Global Kidney Stone Retrieval Devices Trade and Price Analysis

12.2 Kidney Stone Retrieval Devices Parent Market and Other Relevant Analysis

12.3 Publisher Expertise

12.2 Kidney Stone Retrieval Devices Industry Report Sources and Methodology

I would like to order

Product name: Kidney Stone Retrieval Devices Market Outlook 2025-2034: Market Share, and Growth Analysis By Product (Lithotripters, Stone Removal Baskets, Ureterorenoscopes, Ureteral Stents, Other Products), By Cause (Hypercalciuria, Diabetes, Osteoporosis, Obesity, Other Causes), By Treatment, By End-User

Product link: <https://marketpublishers.com/r/K3C3ACB96091EN.html>

Price: US\$ 3,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/K3C3ACB96091EN.html>