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# Urolithiasis Management Devices Market Forecasts to 2034 – Global Analysis By Product (Shock Wave Lithotripters and Ureterorenoscopes), End User (Clinics and Ambulatory Care Centers, Hospitals and Other End Users) and By Geography

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## Abstracts

According to Stratistics MRC, the Global Urolithiasis Management Devices Market is accounted for $1.9 billion in 2026 and is expected to reach $3.3 billion by 2034 growing at a CAGR of 6.9% during the forecast period. Urolithiasis refers to the development of stones in the urinary system. Urolithiasis Management Devices are specialized tools and equipment used in the diagnosis, treatment, and management of urinary stones, including kidney stones and stones within the urinary tract. These devices play a crucial role in minimally invasive treatments, reducing patient discomfort, shortening recovery times, and improving outcomes for individuals suffering from urolithiasis.

According to the European Association of Urology, the prevalence of urinary stones ranges from 1% up to 20%. Renal stones are substantially more common (>10%) in developed nations like Canada, Sweden, and the U.S.

**Market Dynamics:**

**Driver:**

Rising prevalence of urolithiasis

The escalating prevalence of urolithiasis, characterised by a rising incidence of kidney stones and urinary tract stones worldwide, serves as a significant driver in the Urolithiasis Management Devices Market. Lifestyle changes, dietary habits, and factors

like inadequate hydration contribute to the increased occurrence of urolithiasis. This surge in cases necessitates effective management and treatment, fuelling the demand for urolithiasis management devices. As the prevalence continues to grow, there is a heightened need for advanced devices such as lithotripters, ureteroscopes, and stone retrieval tools, driving the market towards innovative solutions.

**Restraint:**

High treatment costs

The expenses associated with urolithiasis management, including surgical procedures, medical devices, and follow-up care, can be substantial. These high costs limit accessibility to advanced treatments and devices, particularly for patients with limited financial means or inadequate insurance coverage. The financial burden discourages some individuals from opting for advanced procedures, impacting their adoption and hindering market growth.

**Opportunity:**

Growing demand for minimally invasive procedures

Patients increasingly prefer minimally invasive treatments due to several advantages, including reduced post-operative pain, shorter hospital stays, quicker recovery times, and a lower risk of complications compared to traditional surgical methods. This trend has surged the demand for urolithiasis management devices that support minimally invasive techniques such as ureteroscopy, laser lithotripsy, and shockwave lithotripsy. Additionally, these devices enable precise targeting of stones while minimising trauma to surrounding tissues. Thus, there is an increasing demand for market growth.

**Threat:**

Risk of infection

Invasive procedures involving urolithiasis management devices, such as ureteral stents or lithotripsy tools, increase the susceptibility to infections. Improperly sterilised equipment, prolonged device placement, or repeated interventions may lead to urinary tract infections or systemic infections. These infections can cause complications, prolong hospital stays, and necessitate additional treatments, impacting patient health outcomes. As a result, it will hinder market demand.

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Covid-19 Impact

The COVID-19 pandemic is causing disruptions in distribution channels and through its financial impact on firms and financial markets. Due to obstacles, various small hospitals and elderly housing units had to be temporarily closed. Additionally, there was a delay in the scheduling of appointments for outpatient clinics, which increased the demand for phone or virtual clinics. The absence of anaesthesia or procedural slots, in-hospital beds, and medical personnel resulted in a major treatment backlog, which had a negative impact on the worldwide urolithiasis management device market.

The ureterorenoscopes segment is expected to be the largest during the forecast period

The ureterorenoscopes segment is estimated to hold the largest share. Ureterorenoscopes consist of flexible or semi-rigid instruments equipped with miniature cameras and fibre-optic technology, allowing urologists to visualise and access stones in the ureter or kidney. They facilitate precise navigation through the urinary tract, enabling procedures like stone fragmentation, retrieval, or laser lithotripsy. Furthermore, ureterorenoscopes play a pivotal role in less invasive interventions, reducing patient discomfort, shortening recovery times, and contributing to effective stone management, thereby shaping the landscape of urolithiasis treatment.

The hospitals segment is expected to have the highest CAGR during the forecast period

The hospitals segment is anticipated to have lucrative growth during the forecast period. Hospitals serve as primary centres for the diagnosis, treatment, and management of urolithiasis cases. Within these facilities, various urolithiasis management devices are utilized, including lithotripters, ureteroscopes, stone retrieval tools, stents, and imaging modalities. Hospitals provide a comprehensive range of urological procedures and surgeries, offering both inpatient and outpatient services for urolithiasis patients. The segment encompasses diverse hospital settings, from large academic medical centres to smaller community hospitals, all contributing to the adoption and utilisation of urolithiasis management devices in the quest for effective patient care.

**Region with largest share:**

Asia Pacific commanded the largest market share during the extrapolated period due to the rising prevalence of urolithiasis, increasing healthcare expenditure, technological advancements, and a growing geriatric population. Moreover, improving healthcare infrastructure, greater accessibility to medical facilities, and expanding awareness about urolithiasis treatment options fuel the adoption of these devices. The Asia-Pacific market presents lucrative opportunities for manufacturers and providers aiming to cater to the evolving needs of urolithiasis patients in the region.

**Region with highest CAGR:**

North America is expected to witness profitable growth over the projection period due to preference for minimally invasive procedures, strong research and development activities, and favourable reimbursement policies. The region, encompassing the United States and Canada, boasts a robust healthcare infrastructure, high healthcare expenditures, and a significant focus on technological innovations in urology. Moreover, the presence of key market players, along with a growing emphasis on patient-centric care and technological advancements, positions North America as a leading hub for cutting-edge urolithiasis treatment solutions.

**Key players in the market**

Some of the key players in the Urolithiasis Management Devices Market include Olympus, Boston Scientific, Karl Storz, Siemens Medical Solutions, Richard Wolf, Cook Medical, Dornier, Elmed, MTS Medical, Direxgroup, Cybersonics, Allengers, BD, DirexGroup, CONMED Corporation, Potent Medical , and HealthTronics, Inc.

**Key Developments:**

In July 2022, Calyxo announced the successful closure of its Series C investment round, securing USD 32.7 million. Based in California, Calyxo has developed the CVAC Aspiration system, designed to eliminate kidney stones without the need for surgery, utilizing irrigation and aspiration methods.

In March 2022, The FDA recognized Applaud Medical's Acoustic Enhancer technology as a breakthrough product. It is designed to break down calcium-based urinary stones that are obstructing or pose a significant risk of future hindrance, provided they are between 6mm and 20 mm in diameter.

Products Covered:

- Shock Wave Lithotripters

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Ureterorenoscopes

End Users Covered:

Clinics and Ambulatory Care Centers

Hospitals

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

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China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants

- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

**Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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