

Urology Surgical Instruments Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Product (Endoscopes, Envision Systems, Peripheral Systems, Accessories & Consumables, Others), By Application (Chronic Kidney Disease, Benign Prostatic Hyperplasia (BPH), Urinary Stones, Urinary Incontinence (UI) and Pelvic Organ Prolapse (POP), Oncology, Others), By Region and Competition

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Abstracts

Global Urology Surgical Instruments Market was valued at USD 10.52 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.64% through 2029. The Urology Surgical Instruments Market encompasses a specialized segment of the medical market dedicated to tools and devices used in surgeries and procedures related to the urinary tract system. This market includes a variety of instruments such as catheters, stents, forceps, laser machines, and endoscopes that are designed specifically for urological surgeries like kidney stone removal, prostate surgeries, bladder repairs, and other related operations. These instruments are critical for performing precise, minimally invasive procedures, contributing to improved patient outcomes and recovery times. Demand within this market is driven by technological advancements, an aging population, and the rising prevalence of urological conditions globally.

Key Market Drivers

Increase in Prevalence of Kidney Diseases and Urinary Tract Infections

A renal infection (pyelonephritis) is a painful and unpleasant condition caused by bacteria migrating from the bladder into one or both kidneys. Diabetes is the major cause behind several kidney disorders which is highly prevalent across the world. Moreover, cardiovascular diseases and obesity are another some of the significant factors which are making people more vulnerable towards urinary infections. According to the report published by MDPI in 2022, it has been observed that approximately 700 million individuals, which account for 9% of the global population, are suffering from chronic kidney disease (CKD). Among them, nearly four million patients are in need of kidney replacement therapy. Prevalence of CKD in patients suffering from type 2 diabetes mellitus differs among nations globally, with rates ranging from 27% in China to 84% in Tanzania. Furthermore, urinary tract infection (UTI) is a frequent problem diagnosed in women, while expecting a baby, and in peri- and postmenopausal females. When women reach menopause, the reduction in estrogen thins the coating of the urinary tract, which enhances susceptibility to bacterial infections. In 2022, Hindawi conducted research that focused on the influence of a woman's age and the phase of her pregnancy on the occurrence of urinary tract infections during pregnancy. Data analysis was done on 158 expectant mothers, with approximately 35.4% of women falling between the ages of 36-45 years, while 38.6% of them were in their initial stage of pregnancy. The overall incidence of urinary tract infections (UTIs) among pregnant women was 33.5%. The incidence was 27.8% for candiduria and 8.9% for bacteriuria. Moreover, it has been observed that pregnant women in the initial three months of their pregnancy had a higher likelihood of developing UTIs. To heal individuals suffering from urinary tract infections, the surgical treatment aims to eliminate identified origins, address the blockage, and enhance the flow of urine. The surgical options for managing recurrent urinary tract infections (rUTI) can vary from less invasive procedures like endoscopic or percutaneous methods, to more invasive options that involve laparoscopic or open approaches. Growing number of such surgical procedures are propelling the demand of cystoscope, urethral sound, ureteric balloon catheter, and others in the market which is therefore anticipated to register an impressive growth to Global Urology Surgical Instruments Market in the forecast period.

Introduction of New Products

Growth in launches of new products which are making the urology surgical procedures less complicated for healthcare professionals are also expected to drive the growth of market in the forecast period. For instance, in November 2020, Baxter International Inc. (US) received 510(k) clearance from the FDA for its automated peritoneal dialysis system, the Homechoice Claria, which incorporates the Sharesource connectivity

platform.

Surge in Technological Advancements

Advancements in technology in the field of urology have led to extensive enhancements in the treatment of patients. Urology experts opt for laparoscopic surgery when employing tiny instruments inserted using a small tube (known as a laparoscope) through minor incisions in the patient's body. Innovative biological sensors, techniques, and tools are being utilized to ensure reduced discomfort, quicker recovery, and improved outcomes for urological issues. For instance, minimally invasive laparoscopic surgery is being offered for kidney stones, pelvic organ prolapses, live donor nephrectomy, ureteral stricture, ureteropelvic junction obstruction, renal cysts, renal cell carcinoma, prostate cancer, and more. Nevertheless, in recent times, urologists have also refined laparoscopic surgery for use in pediatric patients to remove dysfunctional or malformed kidneys, correct obstructed ureters, and treat undescended testicles. Single-port robotic surgery for urologic cancers is an expansion of laparoscopic surgery, which are operations performed through minor openings in the abdominal area. The single-port procedure takes this a stride ahead by facilitating entry of the essential surgical instruments through a single, two-inch cut. The cutting-edge robotic technology permits the surgical instruments to penetrate the body simultaneously, prior to relocating to their designated locations within the abdominal cavity. Fiberoptics enabled the reduction in size of endoscopes and made it easier to develop ureteroscopes that can be steered and deflected. Progress in technology has led to the creation of smaller, actively deflectable, and flexible endoscopes that are more convenient to navigate through the upper urinary system. These scopes, when used in combination with efficient and accurate holmium laser lithotrites and a range of endoscopic retrieval devices, have further improved the overall success of ureteroscopy.

Growth in Geriatric Population

Rise in worldwide geriatric population and their growing susceptibility towards various renal disorders are also attributed to register a lucrative growth to Global Urology Surgical Instruments Market in the forecast period. According to the data released by Population Reference Bureau, it has been noted that China has the greatest proportion of senior citizens, with roughly 166.37 million individuals above the age of 65 out of the overall population. India follows with 84.9 million individuals, the United States with 52.76 million individuals, Japan with 35.58 million individuals, and the Russian Federation with 21.42 million individuals above 65 years old out of the total population. A precise UTI diagnosis is particularly crucial for elderly individuals. These patients are

typically weak and have an elevated chance of encountering severe UTI-related complications, such as being admitted to the hospital, experiencing confusion, and deaths. Older adults also tend to have concurrent diseases, which can make them more vulnerable to develop urinary tract infections. A study was conducted in Department of Urology, Hospital Pulau Pinang, Malaysia in 2021 which involved 460 patients aged above 65 years. Results of the study revealed that Cystitis was the most prevalent urinary infection affecting around 37.6% of people followed by asymptomatic bacteriuria (ASB) (31.9%), pyelonephritis (13.9%), urosepsis (10.2%), and prostatitis (6.4%). Hence, growing demand of management for such prevailing diseases are increasing the number of required surgeries around the world which is thereby propelling the growth of urology surgical instruments in the forecast period.

Key Market Challenges

High Cost of Advanced Instruments

The high cost of advanced urology surgical instruments presents a significant barrier to their widespread adoption globally. While these instruments offer cutting-edge technologies and enhanced functionalities, they often come with a hefty price tag, making them financially prohibitive for many healthcare facilities, particularly those in resource-limited settings. The substantial investment required to procure advanced urology surgical instruments can strain healthcare budgets, limiting access to these innovative tools for patient care. Additionally, ongoing expenses associated with instrument maintenance, repair, and upgrades further contribute to the overall cost burden, deterring healthcare providers from investing in advanced instruments. Moreover, reimbursement challenges and budget constraints may compel healthcare facilities to prioritize cost-saving measures, opting for more affordable alternatives or delaying investments in advanced technologies. Consequently, the high cost of advanced urology surgical instruments acts as a significant deterrent to their adoption globally, hindering the realization of their potential benefits in improving patient outcomes and advancing urological care.

Lack of Skilled Professionals

The lack of skilled professionals poses a notable challenge to the demand for urology surgical instruments globally. Urology surgeries require a high level of expertise and proficiency to ensure optimal patient outcomes and minimize complications. However, there is a shortage of skilled urologists, nurses, and technicians in many regions worldwide, particularly in rural or underserved areas. The complex nature of urological

procedures, coupled with the need for specialized training and experience in using advanced surgical instruments, further exacerbates the shortage of qualified professionals. As a result, healthcare facilities may face challenges in fully utilizing urology surgical instruments, as they lack the trained personnel necessary to perform these procedures effectively. Moreover, the lack of skilled professionals limits the adoption of advanced surgical techniques and technologies, as healthcare providers may be hesitant to invest in sophisticated instruments without the assurance of skilled personnel to operate them. Therefore, addressing the shortage of skilled professionals is crucial to increasing the demand for urology surgical instruments globally and improving access to quality urological care.

Key Market Trends

Innovation in Urology Endoscopes & Accessories

Innovation in urology endoscopes and accessories is driving a significant increase in the demand for urology surgical instruments globally. Urology endoscopes, including cystoscopes, ureteroscopes, and nephoscopes, play a crucial role in the diagnosis and treatment of various urinary tract disorders, such as kidney stones, urinary tract infections, and urological cancers. Recent advancements in endoscopic technologies, such as high-definition imaging, miniaturization, and flexible endoscope designs, have revolutionized urological procedures by enabling minimally invasive approaches with enhanced visualization and precision. Moreover, the development of innovative accessories and adjunctive devices, such as laser lithotripsy probes, biopsy forceps, and stents, further expands the capabilities of urology endoscopes, facilitating a wide range of diagnostic and therapeutic interventions. As a result, healthcare providers are increasingly investing in advanced urology surgical instruments to meet the growing demand for minimally invasive urological procedures, driving the global market for urology surgical instruments and accessories.

Development of Portable & Disposable Instruments

The development of portable and disposable instruments in urology surgery is significantly increasing the demand for urology surgical instruments globally. Portable and disposable instruments offer numerous advantages in urological procedures, particularly in settings where space is limited or where mobility is required, such as ambulatory surgery centers or remote healthcare facilities. These instruments are lightweight, compact, and easy to transport, allowing for greater flexibility and efficiency in surgical settings. Additionally, disposable instruments eliminate the need for

reprocessing and sterilization, reducing the risk of cross-contamination and infection transmission, while also streamlining workflow and reducing costs associated with instrument maintenance. Moreover, the availability of disposable instruments expands access to urological care in resource-limited regions, where infrastructure for sterilization and instrument reprocessing may be inadequate. As a result, the development of portable and disposable urology surgical instruments is driving increased adoption globally, as healthcare providers seek safer, more efficient, and cost-effective solutions for urological procedures.

Segmental Insights

Product Insights

Based on the product, in the Global Urology Surgical Instruments Market, endoscopes have emerged as the frontrunners, establishing their dominance not only over peripheral systems, envision systems, accessories, and consumables, but also by revolutionizing the field of urology itself. These highly versatile instruments serve as the cornerstone for a multitude of urological procedures, offering minimally invasive options that have transformed the way surgeries are performed. With their superior visualization capabilities, endoscopes play a pivotal role in both diagnoses and surgeries, providing medical professionals with the clarity and precision necessary for successful outcomes.

By enabling safer and more efficient procedures, endoscopes have become indispensable tools within the urology market. They continue to shape the landscape of urology by driving advancements in medical technology, allowing for improved patient care and better treatment outcomes. As the demand for minimally invasive procedures grows, the importance of endoscopes as essential instruments will only continue to increase. With ongoing research and technological advancements, the future holds even more promise for these remarkable devices, further enhancing their impact on the field of urology.

Application Insights

Based on the Application segment, the Global Urology Surgical Instruments Market is a dynamic and rapidly evolving field, driven by several key segments that contribute to its growth. One of the prominent segments is chronic kidney disease (CKD), which currently holds a dominant position in the market. This can be attributed to the alarming rise in the prevalence of kidney disorders worldwide, affecting millions of individuals. Moreover, the growing geriatric population, who are particularly vulnerable to urological

conditions, further amplifies the demand for effective treatment options. In response to these challenges, there has been a significant increase in the adoption of advanced surgical instruments specifically designed for urology procedures. The demand for precise and minimally invasive surgical interventions in CKD management has propelled the development and utilization of specialized urology surgical tools. These innovative instruments not only enhance the precision and accuracy of surgical procedures but also contribute to improved patient outcomes and faster recovery times.

The continuous advancements in technology and the introduction of novel surgical techniques further drive the growth of the urology surgical instruments market. This includes the integration of robotic-assisted surgery and the use of cutting-edge imaging technologies, enabling surgeons to perform complex urological procedures with enhanced precision and efficiency. Overall, the Global Urology Surgical Instruments Market is poised for significant expansion, fueled by the increasing demand for advanced surgical interventions in the management of chronic kidney disease and other urological conditions. The continuous innovation in surgical instruments, coupled with the rising prevalence of kidney disorders and the aging population, presents lucrative opportunities for manufacturers and healthcare providers to meet the evolving needs of patients worldwide.

Regional Insights

North America holds a predominant position in the Global Urology Surgical Instruments Market. This is largely due to several factors that contribute to the region's success. North America boasts advanced healthcare infrastructure, which supports the efficient delivery of urology surgical procedures. Secondly, significant investments in research and development further enhance the capabilities and effectiveness of urology surgical instruments in this region. Moreover, the presence of key market players, including renowned manufacturers and healthcare institutions, fosters innovation and drives the market forward. Additionally, the growing prevalence of urological diseases, such as urinary tract infections and kidney stones, combined with the aging population in North America, creates a higher demand for urology surgical instruments. These factors collectively contribute to the continuous growth and dominance of North America in the Global Urology Surgical Instruments Market.

Key Market Players

Medtronic plc

Boston scientific corporation

Karl Storz GmbH & Co. KG

Cook Medical LLC

Richard Wolf GmbH

Teleflex Incorporated

Coloplast Corp.

CONMED Corporation

C. R. Bard Inc.

Olympus Corporation

By Product

By Application

By Region

Endoscopes

Envision Systems

Peripheral Systems

Accessories & Consumables

Others

Chronic Kidney Disease

Benign Prostatic Hyperplasia (BPH)

Urinary Stones

Urinary Incontinence (UI) and Pelvic Organ Prolapse (POP)

Oncology

Others

North America

Europe

Asia Pacific

South America

Middle East & Africa

Report Scope:

In this report, the Global Urology Surgical Instruments Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Urology Surgical Instruments Market, By Product:

Endoscopes

Envision Systems

Peripheral Systems

Accessories & Consumables

Others

Urology Surgical Instruments Market, By Application:

Chronic Kidney Disease

Benign Prostatic Hyperplasia (BPH)

Urinary Stones

Urinary Incontinence (UI) and Pelvic Organ Prolapse (POP)

Oncology

Others

Urology Surgical Instruments Market, By Region:

North America

§ United States

§ Canada

§ Mexico

Europe

§ France

§ United Kingdom

§ Italy

§ Germany

§ Spain

Asia-Pacific

§ China

§ India

§ Japan

§ Australia

§ South Korea

South America

§ Brazil

§ Argentina

§ Colombia

Middle East & Africa

§ South Africa

§ Saudi Arabia

§ UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Urology Surgical Instruments Market.

Available Customizations:

Global Urology Surgical Instruments market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL UROLOGY SURGICAL INSTRUMENTS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Endoscopes, Envision Systems, Peripheral Systems, Accessories & Consumables, Others)
 - 5.2.2. By Application (Chronic Kidney Disease, Benign Prostatic Hyperplasia (BPH), Urinary Stones, Urinary Incontinence (UI) and Pelvic Organ Prolapse (POP), Oncology,

Others)

5.2.3. By Region

5.2.4. By Company (2023)

5.3. Market Map

6. NORTH AMERICA UROLOGY SURGICAL INSTRUMENTS MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product

6.2.2. By Application

6.2.3. By Country

6.3. North America: Country Analysis

6.3.1. United States Urology Surgical Instruments Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Product

6.3.1.2.2. By Application

6.3.2. Mexico Urology Surgical Instruments Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Product

6.3.2.2.2. By Application

6.3.3. Canada Urology Surgical Instruments Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Product

6.3.3.2.2. By Application

7. EUROPE UROLOGY SURGICAL INSTRUMENTS MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product

7.2.2. By Application

7.2.3. By Country

7.3 Europe: Country Analysis

7.3.1. France Urology Surgical Instruments Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Product

7.3.1.2.2. By Application

7.3.2. Germany Urology Surgical Instruments Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Product

7.3.2.2.2. By Application

7.3.3. United Kingdom Urology Surgical Instruments Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Product

7.3.3.2.2. By Application

7.3.4. Italy Urology Surgical Instruments Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Product

7.3.4.2.2. By Application

7.3.5. Spain Urology Surgical Instruments Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Product

7.3.5.2.2. By Application

8. ASIA-PACIFIC UROLOGY SURGICAL INSTRUMENTS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

- 8.2.1. By Product
- 8.2.2. By Application
- 8.2.3. By Country
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China Urology Surgical Instruments Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product
 - 8.3.1.2.2. By Application
 - 8.3.2. India Urology Surgical Instruments Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product
 - 8.3.2.2.2. By Application
 - 8.3.3. South Korea Urology Surgical Instruments Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product
 - 8.3.3.2.2. By Application
 - 8.3.4. Japan Urology Surgical Instruments Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Product
 - 8.3.4.2.2. By Application
 - 8.3.5. Australia Urology Surgical Instruments Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Product
 - 8.3.5.2.2. By Application

9. SOUTH AMERICA UROLOGY SURGICAL INSTRUMENTS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Product

9.2.2. By Application

9.2.3. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Urology Surgical Instruments Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Product

9.3.1.2.2. By Application

9.3.2. Argentina Urology Surgical Instruments Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Product

9.3.2.2.2. By Application

9.3.3. Colombia Urology Surgical Instruments Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Product

9.3.3.2.2. By Application

10. MIDDLE EAST AND AFRICA UROLOGY SURGICAL INSTRUMENTS MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Product

10.2.2. By Application

10.2.3. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Urology Surgical Instruments Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Product

- 10.3.1.2.2. By Application
- 10.3.2. Saudi Arabia Urology Surgical Instruments Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Product
 - 10.3.2.2.2. By Application
- 10.3.3. UAE Urology Surgical Instruments Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Product
 - 10.3.3.2.2. By Application

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

13. PESTLE ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Product

15. COMPETITIVE LANDSCAPE

- 15.1. Medtronic plc.
 - 15.1.1. Business Overview
 - 15.1.2. Company Snapshot
 - 15.1.3. Products & Services
 - 15.1.4. Financials (In case of listed companies)
 - 15.1.5. Recent Developments

- 15.1.6. SWOT Analysis
- 15.2. Boston Scientific Corporation
- 15.3. Karl Storz GmbH & Co. KG
- 15.4. Cook Medical LLC
- 15.5. Richard Wolf GmbH
- 15.6. Teleflex Incorporated
- 15.7. Coloplast Corp.
- 15.8. CONMED Corporation
- 15.9. C. R. Bard Inc.
- 15.10. Olympus Corporation

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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