

Lithotripsy Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product Type (Extracorporeal Shock Wave Lithotripsy Devices and Intracorporeal Lithotripsy Devices, and Ureteroscopic), Application (Kidney Stones, Ureteral Stones, Pancreatic Stones, Bile Duct Stones, and Bladder Stones), End User (Hospitals, Specialty Clinics, and Others), and Geography

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Abstracts

The lithotripsy market size is projected to grow from US\$ 1.4 billion in 2023 to US\$ 2.3 billion by 2031; the market is estimated to record a CAGR of 6.6% during 2021–2031. The medical reimbursement/coverage for noninvasive lithotripsy procedure propels the lithotripsy market development. However, rise in product recalls by the FDA impede the market growth market growth. Furthermore, preference for lithotripsy technique in coronary lesion treatment are likely to remain key lithotripsy market trends during 2021-2031.

Growth Drivers:

Launch of Innovative Lithotripsy Devices

Several manufacturers are developing technologically advanced products used during lithotripsy to remain competitive in the market across the globe. For example, Boston Scientific developed the Lumenis Pulse 120H Holmium Laser System with MOSES 2.0 Technology. The product technology is capable of treating different stone compositions

that utilize several scientific techniques such as stone dusting, popcorning, and fragmentation. Furthermore, it remarkably improves energy transmission, resulting in more efficient lithotripsy treatment compared to regular holmium pulse lithotripsy devices. Also, in Benign Prostatic Hyperplasia (BPH) treatment, MOSES technology results in reducing treatment time by improving enucleation efficiency and hemostasis compared to regular holmium pulse devices. Similarly, in January 2022, Olympus announced the launch of its next-generation SOLTIVE Premium SuperPulsed Laser System (SOLTIVE Laser System). The product offers the potential for short procedure time, better patient outcomes, and low procedure cost as compared to standard Holmium: YAG lithotripsy device. Therefore, the launch of innovative lithotripsy devices drives the market.

Therefore, launching of innovative lithotripsy device is an influential factor responsible for market growth.

Report Segmentation and Scope:

- Based on product type, the lithotripsy market is bifurcated into extracorporeal shock wave lithotripsy devices and intracorporeal lithotripsy devices, and ureteroscopic. The extracorporeal shock wave lithotripsy devices segment held a larger market share in 2023.
- By application, the market is segmented into kidney stones, ureteral stones, pancreatic stones, bile duct stones, and bladder stones. The kidney stones segment held the largest share of the market in 2023.
- By end user, the market is segmented into hospitals, specialty clinics, and others. The hospitals segment dominated the market in 2023.

Type-Based Insights

By type, the lithotripsy market is bifurcated into extracorporeal shock wave lithotripsy devices and intracorporeal lithotripsy devices, and ureteroscopic. The extracorporeal shock wave lithotripsy devices segment held the largest market share of the lithotripsy market in 2023. Extracorporeal Shockwave Lithotripsy (ESWL) is a noninvasive technique that breaks down stones in the urinary system, pancreas, and bile duct. ESWL is one of the most commonly used methods for kidney stones and noninvasive treatment. Also, the recurrence cases of renal stones after ESWL treatment is significantly low. According to a clinical study published in the American Journal of

Roentgenology, 104 (70%) of the 148 patients who underwent ESWL at the University of Florida were evaluated to check recurrent renal stone disease after the treatment. The clinical results obtained by the radiography stated that, after ESWL, new stone formation occurs only at a rate of 5% and is much lower than the expected recurrence rate of 37–50% (which is the standard percentage).

Regional Analysis:

The geographic scope of the lithotripsy market report is mainly segmented into five regions: North America, Asia Pacific, Europe, Middle East & Africa, and South & Central America. Global and regional market analysis covering key market trends, major players, regulations, and recent market developments.

North America has dominated the market. Further, Asia Pacific is anticipated to record the highest CAGR in the coming years. In North America, the US accounted for the largest share of the lithotripsy market in 2023. According to the Korean Urological Association report, the prevalence of nephrolithiasis (kidney stone) is significantly high in the US. The BD company website reveals that kidney stones affect 1 in 11 people in the US annually, causing a considerable healthcare burden and high cost of treatment. The length of time from diagnosis to treatment takes approximately 18 days, with ~50% of the patients recommended to perform lithotripsy procedures [the majority are treated with extracorporeal shockwave lithotripsy (ESWL)] by physicians. Additionally, the most commonly recommended noninvasive procedure in the US is lithotripsy. The NewChoiceHealth.com website reveals that the average cost of lithotripsy in the US accounts for approximately US\$ 12,800. In addition, as the lithotripsy procedure is an outpatient treatment for kidney stone removal, the prices might vary. The following table represents the Virginia State lithotripsy (outpatient cost vs licensed ambulatory surgical center cost) recorded in 2018.

Virginia State Hospital Outpatient (US\$) Licensed Ambulatory Surgical Center (US\$)

Central 8,710 5,385

Eastern 6,273 4,547

Northern 9,796 5,898

Northwestern 9,983 7,133

Southwestern 9,435 NA

Source: Virginia Health Information

Patients undergoing lithotripsy noninvasive procedures can apply for medical reimbursement/coverage in the US, which benefits patients and leads to more lithotripsy procedures (in terms of volume). The New York Urology Specialists report website states that kidney stone treatment in the US is covered under health insurance. The insurance benefits the patients in blood testing, urologist (consultation fees), surgical cost of any chosen noninvasive as well as surgical procedure [lithotripsy, ureteroscopy, or percutaneous nephrolithotomy (PCNL), diagnostic imaging cost, and others]. Therefore, with rising incidences of kidney stones among the US population, demand for lithotripsy devices is also increasing, which boosts the volume of procedures in hospitals and specialized centers due to medical reimbursement/coverage benefits. Therefore, high prevalence of nephrolithiasis accelerates the demand for lithotripsy devices is a key factor influencing the lithotripsy market growth.

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