

Urology Surgical Instruments Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 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, 2019-2029F

Market Report | 2024-08-02 | 182 pages | TechSci Research

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Report description:

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

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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. According to the research published in National Centre for Biotechnology Information, Urinary tract infections (UTIs) are the most prevalent infections treated in outpatient settings, affecting 50-60% of adult women over their lifetime. The incidence of UTIs increases with age, and women over 65 experience these infections at nearly double the rate of the general female population. 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.

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 and it has also mentioned that according to United Nations projections, by 2050, China will have 366 million older adults, significantly surpassing the current total U.S. population of 331 million. By then, the proportion of Chinese adults aged 65 and older is expected to increase from 12% to 26%. 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

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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.

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.

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

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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.

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 Inc
- Richard Wolf GmbH
- Teleflex Incorporated
- Coloplast Corp.
- CONMED Corporation
- C. R. Bard Inc.
- Olympus Corporation

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:

- o Endoscopes
- o Envision Systems
- o Peripheral Systems

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- o Accessories & Consumables

- o Others

? Urology Surgical Instruments Market, By Application:

- o Chronic Kidney Disease

- o Benign Prostatic Hyperplasia (BPH)

- o Urinary Stones

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

- o Oncology

- o Others

? Urology Surgical Instruments Market, By Region:

- o North America

- ? United States

- ? Canada

- ? Mexico

- o Europe

- ? France

- ? United Kingdom

- ? Italy

- ? Germany

- ? Spain

- o Asia-Pacific

- ? China

- ? India

- ? Japan

- ? Australia

- ? South Korea

- o South America

- ? Brazil

- ? Argentina

- ? Colombia

- o 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, TechSci 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).

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