

India Urology Devices Market Assessment, By Product [Dialysis Devices, Endoscopes, Laser and Lithotripsy Devices, Accessories, Others], By Application [Kidney Diseases, Urological Cancer, Bladder Disorders, Benign Prostatic Hyperplasia, Others], By Distribution Channel [Hospitals and Ambulatory Surgical Centers, Dialysis Centers, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

India urology devices market is projected to witness a CAGR of 6.50% during the forecast period FY2025-FY2032, growing from USD 1.35 billion in FY2024 to USD 2.24 billion in FY2032. The market's growth is supported by the rising cases of urological disorders, increasing focus on research and development activities, rising investments by the key players of the market towards the enhancement of their product portfolio, and expansion of the geriatric population. As per the estimates of the United Nations Population Fund, by 2050, the percentage of the elderly population in India is estimated to double to over 20% of the country's total population. This increase is expected to bolster the market's demand as aging increases the risk of bladder and kidney problems, resulting in the requirement for effective urology devices for diagnosing the disease and treating the patient population.

The growth of India's urology devices market is also supported by the rapid population expansion in the country, increasing awareness about the various urinary and kidney diseases, rising investments by the government towards the enhancement of the healthcare infrastructure, and increasing efforts of leading medical device companies to showcase and launch innovative urology devices in India. For instance, Huons Meditech Co., Ltd. (Huons Group), one of the leading medical device manufacturers, is increasingly focusing on expanding its presence in Asian countries, including India, by attending significant international conferences. In October 2024, the company showcased an innovative urology device - URO-UEMXD, an extracorporeal shock wave lithotripsy (ESWL) device, at the Congress of Societe Internationale d'Urologie 2024 (SIU 2024) that was held in New Delhi, India. Rising Efforts to Boost Awareness about Urological Conditions Supports Market Expansion

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Educational institutions, government organizations, and healthcare institutions are actively working to bolster public awareness about different urological conditions and their possible treatments. For instance, the 57th Annual Conference of the Urological Society of India (USI) was held at Samrat Ashok Convention Centre, Patna, in February 2024. Indira Gandhi Institute of Medical Sciences, Patna, the Department of Urology, and the Bihar Urological Society organized the conference, where approximately 1500 delegates, 250 foreign delegates, and 500 postgraduate students participated from the United States, the United Kingdom, Canada, Germany, Nepal, Sri Lanka, Australia, Bangladesh, United Arab Emirates, and Greece. The conference also held various discussions on ureteric and urethral strictures. Such conferences are expected to bolster awareness about urological conditions and also about the novel technologies being launched by pharmaceutical companies and medical equipment manufacturers.

Establishment of Advanced Facilities and Adoption of Novel Technologies Boost Market Demand

The rising efforts of different organizations in the country to introduce novel technologies and products are propelling the expansion of the Indian urology devices market. In September 2023, a robotic urology center was established in UroKul, India's third-largest urology hospital in Pune, India. The robotic center - named Dattatray P. Mhaikar Robotic Urology Centre, is equipped with a Da Vinci RAS system, a 4th generation robotic technology system to cater to the growing demand for robotic-assisted surgery in India.

In August 2024, Apollo Prostate Institute rolled out a novel treatment module for treating various prostate disorders. Steam or water vapor therapy is a unique treatment approach approved by the Food and Drug Administration (FDA) and launched in India. Such efforts are expected to bolster the availability of technologically advanced solutions and enhance patient outcomes, positively influencing the market's expansion.

Increasing Cases of Urological Diseases Support Market Expansion

The rising cases of various urological conditions, including bladder disorders, kidney diseases, and urological cancer, are one of the major drivers of the Indian urology devices market. According to an article published in *Kidney360* (an open-access nephrology journal sponsored by the American Society of Nephrology) in May 2023, approximately 210,000 new cases of kidney failure are being diagnosed in India every year. This increase is augmenting the market's growth as patients suffering from chronic conditions often require a wide range of medical procedures and interventions to manage and treat the condition effectively. Thus, increasing the demand for various urological devices and consumables.

Additionally, due to the growing burden of such conditions, healthcare organizations and government agencies across the country are also significantly investing in upgrading infrastructure and ensuring the availability of technologically advanced medical devices to effectively meet the healthcare requirements of patients suffering from urological diseases. Furthermore, various organizations are also working on increasing awareness about the conditions to promote early diagnosis and ensure swift intervention, increasing the survival rate. Organizations are also promoting regular health checkups to avoid various complications that are associated with late-stage treatment of urological disorders.

Hospitals and Ambulatory Surgical Centers Account for Significant Market Share

The rising prevalence of kidney and urological diseases bolstered the need for hospitals to use effective medical devices to manage, treat, and diagnose the conditions effectively. The growing requirement for hospital urology devices can also be attributed to the increasing construction of kidney centers. In April 2024, Breach Candy Hospital in Mumbai, India, inaugurated a new tower equipped with state-of-the-art facilities and a new kidney center. The medical facility is equipped to serve approximately 12,000 patients annually and has 11 beds for dialysis services. Such constructions are expected to bolster the availability of essential treatment solutions for the patient population and propel the market's demand to keep up with the requirements of the hospitals.

Furthermore, the rapid expansion of the segment is also supported by the established trust of the patient population in the expertise and comprehensive care provided by the professionals at hospitals. The integrated treatment approach of hospitals also allows for seamless management of the conditions. It provides convenience to the patients across the treatment process, from initial consultation to post-treatment follow-ups.

Future Market Scenario (FY2025-FY2032F)

-□According to the India urology devices market analysis, the market is expected to observe significant growth over the forecast period due to increasing initiatives to boost public awareness about various urological conditions, rapid technological advancements, and rising investments towards upgrading healthcare infrastructure.

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-□ Additionally, the country's growing popularity as a medical tourism hub is also expected to propel the market's demand. As per the estimates of the India Brand Equity Foundation (IBEF), in 2024, approximately 7.3 million medical tourists are expected to visit India.

-□ Moreover, rapid technological advancements are resulting in the development and increased availability of minimally invasive devices that improve the effectiveness and precision of urological treatment procedures, thus improving treatment outcomes and encouraging more patients to seek treatment.

Key Players Landscape and Outlook

The key players in the market are actively investing in introducing novel products and technologies to enhance patient convenience and treatment outcomes. For instance, in March 2024, GE HealthCare Technologies Inc. announced the launch of their Prostate Volume Assist (PVA) urology-based artificial intelligence (AI) software. The AI-based software feature is designed to support healthcare professionals in providing treatment, biopsies, and prostate imaging. The new features also offer clinicians various solutions to capture prostate volume and improve workflow rapidly. The introduction of such technologies is expected to aid urologists in managing and treating various conditions with greater confidence, positively influencing the market's expansion.

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