
Kidney Stone Market Overview

The Global Kidney Stone Market is expected to grow at 4.6% CAGR and reach USD 2,508.01 Million till 2025. Kidney stones are formed in an individual's kidneys when ordinary substances in the urine turn out to be excessively concentrated. At the point when this happens, waste material can remain in the kidney or may move down through the urinary tract, eventually passing out from the human body. The factors that are anticipated to propel the growth of the global kidney stone market are rising incidence of urolithiasis, inadequate nutrition intake, and minimally invasive procedures. However, the adverse effects of extracorporeal shock wave lithotripsy hinder the growth of the market during the forecast period.

Market Dynamics

Growing incidences of urolithiasis and minimally invasive procedures are the factors that drive the growth of the global kidney stones market. Urolithiasis causes the development of kidney stones in the urinary system. To treat this disorder, various procedures are used, of which the minimally invasive procedures are the most preferred. Further, the success rate for minimally invasive treatment procedures is 75–100%, depending on the size and the shape of the stones as well as the kidney anatomy. The market for minimally invasive procedures is proliferating due to the increasing expenditure and clinical advantages over conventional treatment routines.

Additionally, urolithiasis is the reason for forming stones in the kidney, bladder, and urethra (urinary tract). Kidney stones are a reason for blood in the urine and pain in the mid-region, flank, or groin. Kidney stones are found in 1 in 20 individuals sooner or later in their life. The major risk factors for kidney disease incorporate high blood pressure, diabetes, and history of kidney failure within the family that are majorly found in individuals that are age 60 or older. For instance, according to the National Kidney Foundation, globally, more than 73 million adults have high blood pressure, and 29 million adults have high diabetes, which are the major reasons for urolithiasis.

GLOBAL KIDNEY STONE MARKET BY TREATMENT, 2018 & 2025 (USD MILLION)
Sources: MRFR Analysis

Segmentation

Based on type, the global kidney stone market has been segmented into calcium oxalate stones, uric acid, struvite kidney stones, cystine stones, and calcium phosphate stones. Calcium oxalate stone is the leading segment and is expected to reach USD 1751.63 million by the end of 2025. The large market share of calcium oxalate stone is due to the rising cases of dehydration, hypernatremia, hypercalciuria, and hyperuricosuria.

The global kidney stone market, based on treatment type, has been segmented into medications, extracorporeal shock wave lithotripsy, ureteroscopy, and percutaneous nephrolithotomy. The ureteroscopy segment is likely to register the fastest growth rate of 4.6% during the forecast period owing to providing an unobstructed view of the urinary tract, take out suspicious-looking tissue, and break up stones.

The global kidney stone market, based on diagnosis, has been segregated into ultrasound, intravenous pyelography, CT scan, X-ray, and others. The ultrasound segment is expected to hold a significant market share during the forecast period owing to the popularity, good anatomical detail of the kidney in a short timeframe, with no exposure to radiation.

Global Kidney Stone Market Share, by Region, 2018 (%)
The global kidney stone market is mainly categorized as North America, Europe, Asia-Pacific, and the Middle East & Africa.

North America is likely to dominate the global kidney stone market with a market share of 43.9% owing to the maximum occurrence and reoccurrence of kidney stones in the US. For instance, according to the report published by the British Association of Urological Surgeons in 2018, the prevalence of kidney stone in the US was 10.7% in 2017.

Europe accounted for the second-largest market share in 2018 due to the increased funding and growing adoption of the technology within the region. Asia-Pacific is expected to contribute to the market growth for kidney stone during the forecast period owing to rising therapeutic demand and rapidly evolving healthcare sector. On the other hand, the Middle East & Africa is expected to observe slow growth due to low per capita disposable incomes, lack of awareness, and less exposure to healthcare services in this region.

Kidney Stone Market Key Players


Some of the key strategies followed by the players operating in the global kidney stone market were innovation, product development, acquisition, and expansion.

- **In November 2016**, Boston Scientific launched Dakota Nitinol Stone Retrieval Device with OpenSure Handle in the US and several European countries. This kidney stone retrieval device is designed to allow to release and capture kidney stones of multiple sizes from complex stones as large as 10 millimeters to fragments as small as one millimeter.

- **In September 2016**, Siemens healthcare launched the combination of the Modularis urological shock wave unit and the flat detector technology of the mobile C-arm Cios Fusion.

Market Segmentation

**Global Kidney Stone Market, by Type**
- Calcium Oxalate Stones
- Uric Acid
- Struvite Kidney Stones
- Cystine Stones
- Calcium Phosphate Stones

**Global Kidney Stone Market, by Treatment Type**
- Medications
- Extracorporeal Shock Wave Lithotripsy (ESWL)
- Ureteroscopy (URS)
- Percutaneous Nephrolithotomy (PCNL)

**Global Kidney Stone Market, by Diagnosis**
- Ultrasound
- Intravenous Pyelography (IVP) or Intravenous Urogram
- CT Scan
- X-Ray
- Others

**Global Kidney Stone Market, by Region**
- North America
  - US
  - Canada
- Europe
  - Germany
- France
- UK
- Italy
- Spain
- Rest of Europe

- Asia-Pacific
  - Japan
  - China
  - India
  - Australia
  - South Korea
  - Rest of Asia-Pacific

- Middle East & Africa
  - UAE
  - Saudi Arabia
  - Egypt
  - Rest of Middle East & Africa

**Intended Audience**
- Kidney stone manufacturers and suppliers
- Medical devices companies
- Research and development (R&D) companies
- Market research and consulting service providers
- Potential investors

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