Flexible and Semi-rigid Ureteroscopy Market Research Report – Forecast to 2023

Global Flexible & Semi-rigid Ureteroscopy Market Research Report, by Product (Flexible Ureteroscopes, Semi-rigid Ureteroscopes), Application (Therapeutic Applications), End-User (Hospitals, Clinics, Ambulatory Surgical Centers)– Global Forecast Till 2023

Market Scenario

Ureteroscopy is a procedure used by urologists to diagnose kidney stones or problems related to the urinary tract. It is usually used in detecting kidney stones in the ureter. While performing ureteroscopy, doctors insert a thin and flexible device into the ureter and bladder (carries urine from kidneys to bladder) to look for the problem. The global flexible and semi-rigid ureteroscopy market is expected to register a CAGR of 5.4% by 2023.

The advancements in surgical techniques and technology have broadened the range of urologic conditions into urothelial carcinoma, renal and ureteric calculi, and ureteral structures. It is mainly observed in males in the age group of 50 to 80 years than in females. According to the National Center for Biotechnology Information, January 2016, 44% of ureteroscopies were performed by using flexible ureteroscopies, 31% by rigid ureteroscopies, and 25% by associated rigid and flexible ureteroscopies. It was also reported that the urinary stone disease is affecting 3 men to 1 woman, between the age of 40 and 50. The major key factors responsible for influencing this market are increasing dehydration, digestive diseases and surgery, increasing obesity, family history related to kidney problems, and other medical conditions. Other conditions could be certain diets such as eating high in protein-sugar and sodium (salt) which may increase the risk of some types of kidney stones. However, factors such as the high cost of surgical procedures and difficulty in cannulation and identification of ureteral NB orifice are expected to restrict the market growth during the forecast period.

Segmentation

The global flexible and semi-rigid ureteroscopy market is segmented on the basis of product, application, and end-user. The flexible and semi-rigid ureteroscopy market, by product, is categorized into flexible ureteroscopes, semi-rigid ureteroscopes, and rigid ureteroscopes. Flexible ureteroscopes are further segmented into fiberoptic ureteroscopes and digital ureteroscopes. On the basis of application, the market is segmented into therapeutic applications and diagnostic applications. Therapeutic applications are further segmented into urinary stricture, urolithiasis, and kidney cancer. On the basis of end-user, the market is segmented into hospitals and clinics, diagnostic centers, ambulatory surgical centers, research centers, and others.

On the basis of region, the global flexible and semi-rigid ureteroscopy market is segmented into the Americas, Europe, Asia-Pacific, and the Middle East and Africa. The Americas is sub-segmented into North America and South America. The North American region is further segmented into the US and Canada. The European region is divided into two, namely, Western Europe and Eastern Europe. Western Europe is further classified into Germany, Italy, France, the UK, Spain, and the rest of Western Europe. The Asia-Pacific region is sub-segmented into Japan, China, India, Australia, the Republic of Korea, and the rest of Asia-Pacific. The Middle Eastern and African region is sub-segmented into the UAE, Saudi Arabia, Oman, Kuwait, Qatar, and the rest of the Middle East and Africa.
Key players

Some of the key players in the global flexible and semi-rigid ureteroscopy market are Stryker (US), Olympus Corporation (Japan), Boston Scientific (US), Richard Wolf (Germany), KARL STORZ (Switzerland), ELMED Medical Systems (Turkey), Maxer Endoscopy (Germany), Rocamed (France), Vimex Endoscopy (Poland), ProSurg (US), and others.

Regional Market Summary

Global Flexible & Semi-Rigid Ureteroscopy Market Share (%), by Region, 2017

Sources: National Cancer Institute, Cancer Research UK, the American Cancer Society, Inc, US Department of Health and Human Services National Institutes of Health

It is estimated that North America dominated the global flexible and semi-rigid ureteroscopy market owing to the increasing in the prevalence of kidney stone and increasing obesity and innovations in clinical practice treatment in this region. According to the National Kidney Foundation, January 2016, the prevalence of kidney stone increased from 3.8% to 8.8% from the late 1970s to the late 2000s, respectively in the US and is expected to grow during the forecast period. This influences the market growth in this region.

Europe stood second largest in the flexible and semi-rigid ureteroscopy market owing to the increasing use of concentrated drinks, crash diets, and change in lifestyle. According to the Natural Hydration Council, March 2015, the cases of kidney stone increased by 136% in the last 10 years from 5,063 cases from 2003 to 2004 to 11,937 cases from 2013 to 2014. Such a high prevalence of kidney stone in this region facilitates the market growth.

Asia-Pacific was projected to be the rapidly growing region for the global flexible and semi-rigid ureteroscopy market in 2017. The market is expected to witness growth owing to the rising prevalence of kidney problems, changing lifestyle, and increasing crash diets within the population. These factors are responsible for the growth of the flexible and semi-rigid ureteroscopy market in this region.

The Middle East and Africa holds the least share in the global flexible and semi-rigid ureteroscopy market due to lack of awareness, poor health expenditure, and low economic countries. However, the market is expected to witness growth due to the increasing number of kidney healthcare programs in the Middle East.

Intended Audience

- Pharmaceutical companies
- Biotechnological institutes
- Government and private laboratories
- Research and Development (R&D) companies
- Medical research laboratories
- Market research and consulting service providers

Market Segmentation and Key Market Players

Global Flexible & Semi-Rigid Ureteroscopy Market, by Product
Flexible Ureteroscopes
Fiberoptic Ureteroscopes
Digital Ureteroscopes
Semi-rigid Ureteroscopes
Rigid Ureteroscopes

Global Flexible & Semi-Rigid Ureteroscopy Market, by Application
- Therapeutic Applications
  - Urinary Stricture
  - Urolithiasis
  - Kidney Cancer
- Diagnostic Applications

Global Flexible & Semi-Rigid Ureteroscopy Market, by End-Users
- Hospitals and clinics
- Ambulatory surgical centers
- Diagnostic centers
- Research centers
- Others

Global Flexible & Semi-Rigid Ureteroscopy Market, by Region
- Americas
- Europe
- Asia-Pacific
- Middle East & Africa

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