

# **Urolithiasis (Urinary Stones) Management Devices Markets Worldwide**

## **Report Highlights**

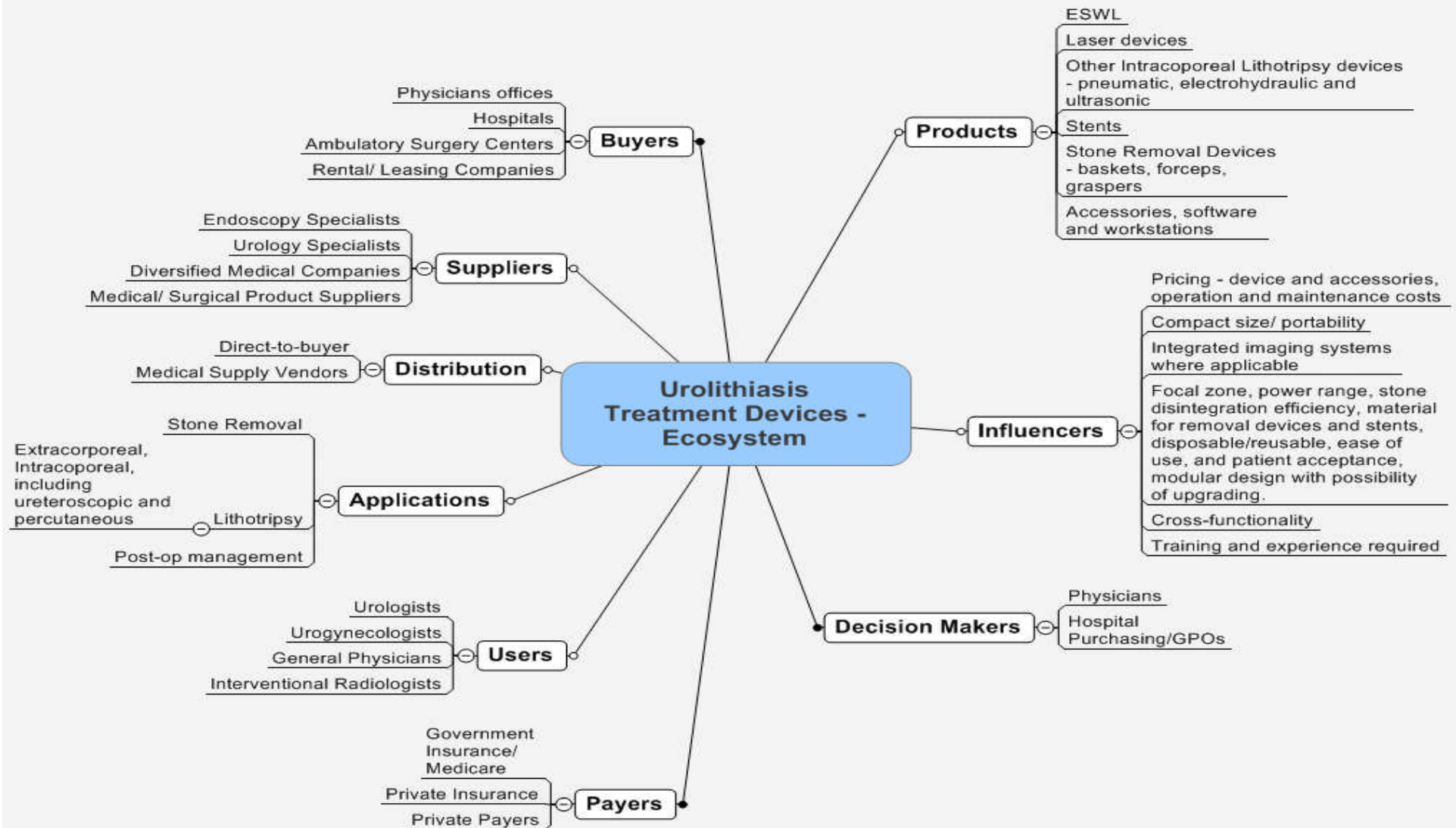
**May 2010**

This report can help in:

- Assessing the market for Urolithiasis (Urinary Stone) Management Devices worldwide, growth segments, and growth regions.
- Understanding market drivers and restraints, market segmentation, and competitive segmentation.
- Strategic planning and competitive strategy.
- Identifying opportunities for partnerships and alliances.

# Key Takeaways

- **The world market for Urolithiasis (Urinary Stone) Management Devices is expected to touch \$552 million by the end of 2010.**
- **Growth drivers include: growing rates of urolithiasis worldwide, demand for non-invasive and minimally invasive treatments.**
- **Restraints include : sluggish economies in the largest healthcare markets; price wars and high entry barriers particularly in the well established markets of advanced countries; lower efficacy of ESWL devices makes the leasing option more attractive to end-users in many countries.**
- **Technology trends include: advanced, combination imaging/ localization systems, OR integration capability, improved lithotripsy devices that are compatible with the latest flexible urological endoscopes, in particular the holmium laser lithotripters and stone removal devices that enhance treatment efficacy.**
- **Greatest market opportunities include: Emerging healthcare markets of Asia and Latin America which also have the highest growing rates of kidney stone disease**



# Key Market Drivers

- Globally rising rates of urolithiasis is the main driver. Increase in the rate of risk factors such as obesity and diabetes, growing affluence and related demographic trends are important trends to monitor.
- Demand for minimally invasive surgical options.
- More cost-effective technologies that allow fewer treatment cycles with minimal or no sedation.
- Increasing usage of endoscopic lithotripters and related accessories, particularly in well established markets. This is due to broader availability of flexible ureteroscopes and high tech imaging devices, as well as more clinicians trained in endoscopy.
- Availability of government sponsored and private health insurance.

# Sample Market Data Table

## World Holmium Lasers Revenue Forecasts by Country/Region - 2008-2016 (\$ Mill)

YEAR	USA	EUROPE	JAPAN	ROW	TOTAL	GROWTH (%)
2008						
2009						
2010						
2011						
2012						
2013						
2014						
2015						
2016						

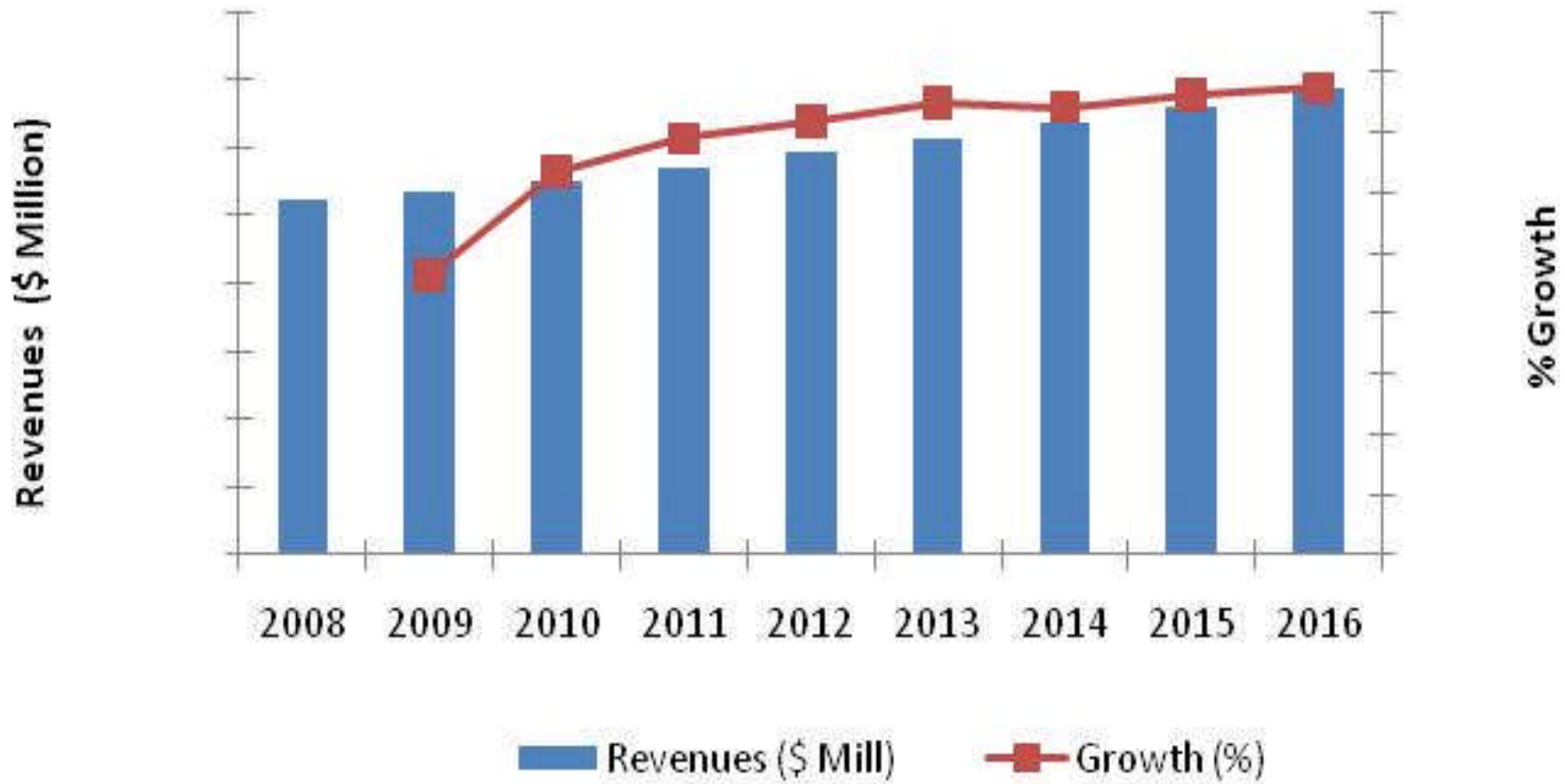
**CAGR**

### Notes:

1. ROW includes all countries/regions other than USA, Europe, Japan
2. Data are at the manufacturer level; US \$ Mill

Source: Marketstrat™

# Sample Chart



<b>Regions Covered</b>	US, Europe, Japan, Rest of the World (ROW)
<b>Product/Market Segments</b>	<ul style="list-style-type: none"><li>• Extracorporeal shock wave lithotripsy devices</li><li>• Holmium laser devices</li><li>• Intracorporeal lithotripsy devices</li><li>• Stone Retrieval devices</li><li>• Ureteral Stents</li></ul>
<b>Companies Profiled</b>	~ 36 companies worldwide
<b>Market Estimates/ Forecasts</b>	In US dollars for 2008-2016
<b>Report Code</b>	295-10
<b>Price</b>	\$2995 (single-user license); \$5990 (corporate license)
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