

# Brazil and Mexico Ultrasound Market: Analysis and Forecast, 2023-2030

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## Abstracts

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### Introduction

The global ultrasound market is experiencing rapid transformation, with Brazil and Mexico emerging as significant growth regions. This document provides an in-depth analysis of the Brazil and Mexico ultrasound markets, highlighting key trends, market dynamics, and opportunities. It focuses on emerging preferences, technological advancements, and regional variations shaping these markets.

### Market Trends and Preferences

#### Brazil: Growing Preference for Handheld Ultrasound Systems

Traditionally, cart-based ultrasound systems dominated the market; however, handheld systems are increasingly gaining traction. The compact size, portability, and user-friendly interfaces of handheld devices have driven their adoption among a broader range of healthcare practitioners. This shift highlights the rising demand for convenient and efficient diagnostic tools.

Customers prioritize high image quality and resolution for precise diagnostics. Ergonomic designs and intuitive interfaces are also essential for seamless integration into clinical workflows. These preferences have driven innovation in both portable and traditional ultrasound systems.

#### Mexico: Cost-Effectiveness Driving Purchase Decisions

In Mexico, economic considerations significantly influence purchasing decisions. Budget constraints have increased the demand for used systems, especially in the radiology and women's health segments. Healthcare facilities are inclined towards cost-effective solutions, with pre-owned systems being preferred over refurbished ones.

The high teenage pregnancy rate in Mexico, one of the highest among OECD countries, has driven the demand for fetal monitoring through ultrasound. Similarly, the veterinary segment is experiencing growth due to increasing cross-border demand from U.S. clients seeking affordable diagnostic services.

## Regional Market Analysis

### Brazil: Key Growth Regions

The ultrasound market in Brazil was valued at \$118.5 million in 2022 and is anticipated to grow to \$209.2 million by the end of 2030, at a projected CAGR of 7.49% during the forecast period 2023-2030. Growth is concentrated in the southeast region, particularly in S?o Paulo, with expansion expected in the central-west and northeast regions as healthcare infrastructure improves. The installed base is projected to grow from 60,693 units in 2022 to 96,510 units by 2030, reflecting a CAGR of 6.10%.

S?o Paulo: Dominates with a market size of \$28.3 million (2022) and a CAGR of 8.12%.

Minas Gerais and Rio de Janeiro: Significant contributors with strong demand for women's health and radiology applications.

### Mexico: Rising Demand for Advanced Technologies

The ultrasound market in Mexico was valued at \$73.8 million in 2022 and is anticipated to grow to \$117.5 million by the end of 2030, at a projected CAGR of 6.08% during the forecast period 2023-2030. Public and private investments are driving the adoption of advanced technologies, with the installed base growing from 39,639 units in 2022 to 57,265 units by 2030 (CAGR: 4.80%).

Mexico City: The largest market with an estimated size of \$18.5 million (2022) and a CAGR of 7.06%.

Nuevo Le?n and Jalisco: Emerging markets driven by increasing healthcare awareness and investments.

## Application-Specific Insights

### Women's Health Applications

In Brazil, women's health holds the largest market share (58.44% in 2022), driven by obstetrics and gynecology applications. The segment is expected to grow at a CAGR of 8.24%.

In Mexico, teenage pregnancies significantly contribute to the demand for ultrasound devices, with the women's health segment expected to capture 38.89% of the market by 2030 (CAGR: 6.72%).

### Veterinary Applications

Veterinary ultrasound is witnessing robust growth, with a CAGR of 11.23% in Brazil and 9.49% in Mexico (2023-2030). This growth is fueled by increasing pet adoption and strategic collaborations with vendors.

### Primary and Specialty Care

Primary care and specialty applications constitute a significant portion of the market in both countries. In Brazil, cardiology and radiology applications account for around 30% of the market, with rising demand anticipated.

Mexico's primary care and point-of-care segments are projected to hold 20% of the market by 2030.

## Technological Advancements

### Integration of AI in Ultrasound Systems

Ultrasound original equipment manufacturers (OEMs) are leveraging artificial intelligence (AI) to enhance diagnostic capabilities. Features like AI-enabled ejection fraction assessment exemplify how existing tools are being adapted to meet evolving healthcare needs.

### 3D and 4D Imaging

The adoption of advanced imaging technologies, such as 3D and 4D, is a significant driver of market growth. These technologies offer enhanced diagnostic precision, particularly in obstetrics, gynecology, and oncology.

### Market Challenges and Opportunities

#### Challenges

1. **Supply Chain Disruptions:** Extended lead times and price hikes in 2022 posed significant challenges. While flexibility in 2023 has improved conditions, moderate price increases continue.
2. **Import Tariffs in Brazil:** A 10%-35% import tax and pricing preferences for domestically manufactured goods impact market dynamics. Vendors are exploring local assembly to mitigate these barriers.

#### Opportunities

1. **Untapped Regional Markets:** Brazil's central-west and northeast regions and Mexico's smaller states present growth opportunities as healthcare infrastructure develops.
2. **Rising Cancer Incidence:** Non-ionizing ultrasound imaging is increasingly favored for cancer detection, creating demand for high-resolution devices.
3. **Growing Veterinary Sector:** Increased pet adoption and cross-border veterinary services drive demand for portable and advanced veterinary ultrasound systems.

#### Conclusion

The ultrasound markets in Brazil and Mexico are poised for substantial growth, driven by technological advancements, regional expansions, and evolving customer

preferences. Strategic investments in portable and AI-integrated technologies, along with a focus on untapped regions, will be key for stakeholders. The women's health and veterinary segments are particularly promising, reflecting broader demographic and social trends in both countries.

By aligning strategies with these trends, market players can capitalize on the growth potential in these dynamic markets, contributing to improved healthcare outcomes and expanding their footprint in Latin America.

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