

# **Interventional Ultrasound Market - A Global and Regional Analysis: Focus on Application, End User, and Region - Analysis and Forecast, 2025-2035**

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## **Abstracts**

This report can be delivered within 1 working day.

### **Introduction of Interventional Ultrasound Market**

The global interventional ultrasound market, initially valued at \$2,238.7 million in 2024, is projected to witness substantial growth, surging to \$4,223.7 million by 2035, marking a remarkable compound annual growth rate (CAGR) of 6.05% over the period from 2025 to 2035.

This steady growth is being driven by the increasing preference for minimally invasive procedures, a rising global burden of chronic diseases, and the expanding use of image-guided interventions across clinical specialties such as cardiology and oncology. Interventional ultrasound offers several advantages over traditional modalities, including real-time guidance, reduced radiation exposure, and cost-effectiveness, making it increasingly attractive for both hospital and outpatient settings.

Technological innovations, such as the incorporation of contrast-enhanced ultrasound, elastography, and artificial intelligence-based automation, are further enhancing the precision, usability, and diagnostic value of interventional ultrasound systems. However, limitations such as operator dependency, variability in image quality, and reimbursement challenges in certain regions may constrain market penetration. Despite these barriers, ongoing R&D efforts, increasing clinical applications, and growing demand for real-time, non-radiative imaging are expected to support the sustained expansion of the interventional ultrasound market.

## Market Introduction

The interventional ultrasound market has been undergoing significant transformation, driven by continuous technological advancements, strategic partnerships, and expanding clinical applications that emphasize minimally invasive, real-time image-guided interventions. Companies are increasingly integrating artificial intelligence, 3D imaging, elastography, and contrast-enhanced ultrasound into their platforms to enhance procedural accuracy and workflow efficiency. Innovations such as GE HealthCare's Versana Premier, Canon Inc.'s Aplio i-series, and Siemens Healthineers AG's AI-enabled interventional ultrasound systems reflect this trend. Strategic acquisitions and R&D investments are further broadening product portfolios and reinforcing market presence. As ultrasound-guided biopsies, tumor ablation, and vascular access procedures become more widely adopted, interventional ultrasound is increasingly positioned as a cornerstone of modern image-guided therapeutics, offering precision, safety, and radiation-free alternatives across diverse clinical settings.

## Industrial Impact

The global interventional ultrasound market has been experiencing a notable shift in clinical practice, driven by growing demand for real-time, radiation-free imaging solutions across a wide range of therapeutic procedures. Industry leaders such as Canon Inc., Esaote SPA, GE HealthCare, Koninklijke Philips N.V., and Siemens Healthineers AG have been playing a central role in advancing interventional ultrasound technologies that support precision-guided interventions beyond traditional diagnostic applications. These systems are critical tools in oncology, cardiology, and emergency medicine, enabling targeted treatments with minimal patient trauma. By streamlining complex procedures, reducing reliance on fluoroscopy or CT, and enhancing access in outpatient and resource-limited settings, interventional ultrasound has been contributing to more efficient care delivery and improved procedural outcomes. The market's industrial impact is further amplified by its role in broadening clinical capabilities and supporting the global trend toward minimally invasive, value-based healthcare.

## Market Segmentation:

Segmentation 1: by Application

General Surgery

Cancer

Cardiac and Endovascular

Others

### General Surgery Segment to Dominate the Interventional Ultrasound Market (by Application)

Based on application, the global interventional ultrasound market was led by general surgery, which held a 39.8% share in 2024. The segment dominates the market primarily due to its broad clinical utility and increasing adoption of minimally invasive surgical systems. Interventional ultrasound is increasingly being used in general surgical procedures for real-time guidance in biopsies, fluid drainage, tumor ablation, and vascular access. Its ability to provide dynamic, real-time imaging without radiation exposure makes it an ideal modality for intraoperative decision-making and precision targeting.

### Segmentation 2: by End User

Hospitals and Clinics

Ambulatory Surgical Centers

Others (Research Use)

### Hospitals and Clinics Segment to Dominate the Interventional Ultrasound Market (by End User)

Based on end user, the global interventional ultrasound market was led by the hospitals and clinics segment, which held a 79.1% share in 2024. Hospitals and clinics dominate the interventional ultrasound market based on end-users due to the pivotal role hospitals and large clinical centers play in delivering advanced, high-volume, and multidisciplinary interventional care. Equipped with state-of-the-art infrastructure, skilled healthcare professionals, and dedicated departments such as general surgery, oncology, cardiology, and emergency medicine, hospitals are ideally positioned to adopt and utilize interventional ultrasound systems for a wide range of procedures. These systems are essential for enabling precise, real-time guidance during minimally invasive

interventions, ultimately improving procedural outcomes and reducing patient recovery times. The capacity of hospitals and clinics to invest in next-generation technologies, including AI-integrated and portable ultrasound platforms, further supports their leadership in this segment. Moreover, the increasing shift toward outpatient and day-care procedures within clinical settings continues to reinforce their market share, making hospitals and clinics the cornerstone of interventional ultrasound adoption globally.

### Segmentation 3: by Region

#### North America

U.S.

Canada

#### Europe

U.K.

France

Germany

Italy

Spain

Rest-of-Europe

#### Asia-Pacific

Japan

China

India

Australia

South Korea

Rest-of-Asia-Pacific

Latin America

Brazil

Mexico

Rest-of-Latin America

Middle East and Africa

The interventional ultrasound market in the Asia-Pacific region is expected to witness a significant growth rate of 7.06% during the forecast period. This strong growth trajectory is driven by a combination of factors, including rapid advancements in healthcare infrastructure, rising demand for minimally invasive procedures, and the increasing adoption of real-time imaging technologies across surgical and diagnostic settings. Asia-Pacific is home to some of the most technologically advanced hospitals and academic institutions, particularly in countries such as China, Japan, South Korea, and India, where there is growing investment in precision medicine and image-guided therapies. Additionally, the region's large patient population and increasing prevalence of chronic conditions such as cancer, cardiovascular disease, and liver disorders have been fueling the demand for interventional ultrasound across a variety of specialties.

### **Recent Developments in the Interventional Ultrasound Market**

In February 2024, Canon Inc. introduced the Aplio beyond, a compact, eco-friendly ultrasound system that integrates advanced imaging capabilities with ergonomic design, aiming to enhance clinical workflows and patient care.

In January 2025, GE HealthCare has received FDA 510(k) clearance for its updated Voluson Expert Series ultrasound systems, including the Voluson Expert 22, 20, and 18, which integrate advanced artificial intelligence features, enhanced imaging tools, and ergonomic design to improve workflow efficiency and diagnostic accuracy in women's healthcare, particularly for high-risk

pregnancies.

In August 2024, Koninklijke Philips N.V. partnered with Carilion Clinic to equip the new Cardiovascular Institute at Crystal Spring Tower with 11 advanced interventional suites, integrating cutting-edge imaging and ultrasound technologies to enhance cardiovascular care and optimize clinical performance for complex procedures.

In April 2024, Esaote Group established a new manufacturing facility in Uttar Pradesh, India, through its subsidiary Esaote Asia-Pacific Diagnostic Private Limited, to produce advanced Made in India ultrasound systems for the local market. The site is expected to deliver the MyLab A, MyLab E series, and compact portable models, all featuring AI-powered augmented insight technology and innovative touchscreen controls.

## **Demand – Drivers, Challenges, and Opportunities**

### Market Drivers

**Rising Demand for Minimally Invasive Procedures:** The increasing demand for minimally invasive procedures is a key driver of the interventional ultrasound market. Minimally invasive techniques have been transforming the healthcare landscape by offering clear advantages over traditional open surgeries, including a lower risk of infection and significantly faster recovery times. According to Paragon Surgical Center, patients undergoing minimally invasive treatments can typically resume normal activities within days or weeks, compared to the extended recovery periods associated with open surgeries. Interventional ultrasound plays a central role in this transformation by providing real-time, radiation-free imaging that allows for precise targeting during procedures such as biopsies, tumor ablations, and vascular access. This not only minimizes collateral tissue damage but also enhances procedural accuracy and safety. Further, as the global burden of chronic conditions rises and patient preferences shift toward quicker and less invasive treatments, the adoption of interventional ultrasound systems is expected to accelerate across diverse clinical settings.

### Market Challenges

**High Cost of Equipment and Procedures:** Despite its clinical benefits, the high cost associated with advanced interventional ultrasound systems remains a significant

barrier to broader adoption, particularly in cost-sensitive and resource-limited environments. High-end ultrasound platforms equipped with AI-driven software and contrast-enhanced imaging features demand substantial capital investment, making them less accessible to smaller clinics or public healthcare institutions. Moreover, procedure-related expenses, including disposable instruments and ongoing maintenance, can further strain healthcare budgets. These cost constraints limit deployment in rural and underserved regions, where access to advanced imaging is already restricted. Addressing these affordability challenges is expected to be crucial to achieving more equitable adoption of interventional ultrasound technology worldwide.

### Market Opportunities

**Expansion in Emerging Markets:** Emerging markets present a substantial growth opportunity for the interventional ultrasound market, driven by rising healthcare investments, improving infrastructure, and increasing awareness of minimally invasive techniques. Countries in Asia-Pacific, Latin America, and the Middle East have been witnessing rapid growth in healthcare expenditure and a growing burden of chronic diseases, creating demand for scalable and cost-effective imaging solutions. Additionally, initiatives by governments and global health organizations to improve access to diagnostic and therapeutic tools are accelerating the adoption of interventional ultrasound systems. Market players expanding their presence through local partnerships, training programs, and region-specific product lines stand to benefit significantly from the untapped potential in these fast-growing economies.

### How can this report add value to an organization?

**Product/Innovation Strategy:** The global interventional ultrasound market has been extensively segmented based on various categories, such as application, end user, and region. This can help readers get a clear overview of which segments account for the largest share and which ones are well-positioned to grow in the coming years.

**Growth/Marketing Strategy:** New offerings accounted for the maximum number of key developments, i.e., nearly 58.1% of the total developments in the global interventional ultrasound market were between January 2021 and May 2025.

**Competitive Strategy:** The global interventional ultrasound market has numerous established players with product portfolios. Key players in the global interventional ultrasound market analyzed and profiled in the study include established players offering products for interventional ultrasound systems.

## Methodology

### Key Considerations and Assumptions in Market Engineering and Validation

The base year considered for the calculation of the market size is 2024. A historical year analysis has been done for the period FY2022-FY2023. The market size has been estimated for FY2024 and projected for the period FY2025-FY2035.

The scope of this report has been carefully derived based on interactions with experts in different companies across the world. This report presents a comprehensive market study of the upstream and downstream products in the interventional ultrasound market.

The market contribution of interventional ultrasound is anticipated to be launched in the future and has been calculated based on the historical analysis of the solutions.

Revenues of the companies have been referenced from their annual reports for FY2023 and FY2024. For private companies, revenues have been estimated based on factors such as inputs obtained from primary research, funding history, market collaborations, and operational history.

The market has been mapped based on the available interventional ultrasound systems. All the key companies with significant offerings in this field have been considered and profiled in this report.

## Primary Research

The primary sources involve industry experts in interventional ultrasound, including the market players offering products and services. Resources such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

### **The key data points taken from the primary sources include:**

Validation and triangulation of all the numbers and graphs

Validation of the report's segmentation and key qualitative findings

Understanding the competitive landscape and business model

Current and proposed production values of a product by market players

Validation of the numbers of the different segments of the market in focus

Percentage split of individual markets for regional analysis

## **Secondary Research**

### Open Sources

Certified publications, articles from recognized authors, white papers, directories, and major databases, among others

Annual reports, SEC filings, and investor presentations of the leading market players

Company websites and a detailed study of their product portfolio

Gold standard magazines, journals, white papers, press releases, and news articles

Paid databases

The key data points taken from the secondary sources include:

Segmentations and percentage shares

Data for market value

Key industry trends of the top players in the market

Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

Quantitative data for mathematical and statistical calculations

### **Key Market Players and Competition Synopsis**

The companies profiled have been selected based on inputs gathered from an analysis of company coverage, product portfolio, and market penetration.

#### **Some prominent names established in this market are:**

Canon Inc.

DeepSight Technology, Inc.

Edan Instruments

Esaote SPA

FUJIFILM Holdings Corporation

GE HealthCare

Konica Minolta, Inc.

Koninklijke Philips N.V.

Samsung Healthcare

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