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Global Focused Ultrasound Neuromodulation System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Focused Ultrasound Neuromodulation System market size is expected to reach $ 44.01 million by 2032, rising at a market growth of 12.6% CAGR during the forecast period (2026-2032).

Focused Ultrasound Neuromodulation System refers to a medical and research equipment platform that uses focused ultrasound technology to provide non-invasive stimulation and functional modulation of targeted neural regions. The system generates and focuses low-intensity ultrasound energy through ultrasound transducer arrays to create precise acoustic fields in targeted brain regions or neural tissues, while integrating targeting and navigation technologies, acoustic control systems, and software algorithms to regulate neural activities. The system typically consists of focused ultrasound transducers, ultrasound drive and control modules, targeting/navigation modules, stimulation parameter management software, and necessary imaging or monitoring components. It is primarily applied in neuroscience research, neural circuit modulation, exploration of psychiatric and neurological disorder treatments, pain management, and emerging brain-computer interface research.

Key Findings

The 2025 global average price of focused ultrasound neuromodulation systems was approximately US$600,000–900,000 per unit.

Complete focused ultrasound neuromodulation platforms remained the major product category.

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Phased-array transducers and high-precision targeting systems occupied the premium price segment.

Psychiatric disorders, chronic pain and brain-computer interface research represented the main growth areas.

North America maintained the leading position in technology development and commercial supply.

Market Trends

The focused ultrasound neuromodulation industry is transitioning from laboratory research platforms toward clinical-oriented systems. Product development is increasingly focused on improving transcranial stimulation accuracy, compensating for skull-induced ultrasound distortion, integrating navigation technologies and enabling more adaptive stimulation control. Compared with conventional electrical and magnetic neuromodulation technologies, focused ultrasound provides non-invasive deep neural targeting and improved spatial selectivity, creating new opportunities for precise neural circuit modulation.

The technology roadmap is gradually moving toward intelligent systems integrating imaging guidance, navigation algorithms, acoustic field optimization and adaptive control capabilities. Although commercial deployment remains limited compared with mature neuromodulation technologies, continued advances in clinical validation and regulatory progress are expected to expand future adoption.

Market Dynamics

Drivers

Growing demand for non-invasive neuromodulation technologies is a major driver of market development. Increasing research activity in depression, neurodegenerative diseases, chronic pain and cognitive disorders is accelerating demand for more precise brain stimulation approaches. Focused ultrasound provides a potential solution for deep neural modulation without surgical implantation, supporting long-term technology adoption.

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Advances in phased-array transducers, acoustic simulation, AI-based targeting algorithms and personalized skull compensation technologies are improving stimulation accuracy and system performance.

Restraints

Market development remains constrained by limited clinical commercialization, high system costs and the need for additional evidence regarding long-term therapeutic effectiveness. Compared with established technologies such as DBS and TMS, focused ultrasound neuromodulation requires further clinical validation and standardized treatment protocols.

The limited number of commercial suppliers and relatively small installed base also restrict near-term market expansion.

Opportunities

The development of non-invasive brain-computer interfaces, precision psychiatry and personalized neuromodulation provides new opportunities for focused ultrasound systems. Future integration with AI-based neural decoding, adaptive stimulation algorithms and multimodal brain monitoring may expand potential applications.

Asia-Pacific markets, particularly China, are expected to become important growth regions due to increasing investment in neuroscience research, artificial intelligence and medical technology innovation.

Challenges

The industry faces challenges related to regulatory approval, clinical evidence accumulation, manufacturing complexity and cost reduction. Achieving consistent stimulation accuracy through the human skull remains a key technical challenge, while establishing reimbursement pathways will influence long-term clinical commercialization.

Industry Chain Analysis

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The focused ultrasound neuromodulation industry chain includes upstream component suppliers, midstream system manufacturers and downstream research and clinical users. Upstream activities include piezoelectric materials, ultrasound transducer manufacturing, electronic control components, imaging technologies and software algorithms. Midstream companies integrate acoustic hardware, control systems, targeting technologies and application software into complete neuromodulation platforms. Downstream users mainly include universities, neuroscience research centers, hospitals and clinical trial organizations.

Value Chain Analysis

Value creation is concentrated in high-precision transducer design, acoustic field control, neural targeting algorithms and system integration capabilities. Compared with conventional ultrasound equipment, focused ultrasound neuromodulation systems require stronger hardware-software integration, resulting in higher technical barriers and greater value concentration among specialized platform providers.

Segment Insights

By product structure, complete neuromodulation systems represent the largest commercial segment because users typically require integrated stimulation, targeting and control capabilities. By technology route, low-intensity focused ultrasound and transcranial focused ultrasound remain the dominant approaches. By system configuration, image-guided and navigation-assisted systems represent higher-value configurations, while closed-loop focused ultrasound neuromodulation remains an emerging technology direction rather than a mainstream commercial segment.

Downstream Market Opportunities

Academic and research institutions remain the primary customer group, supported by neuroscience studies and clinical exploration programs. Psychiatric disorders, chronic pain, neurodegenerative diseases and brain-computer interface research represent promising downstream opportunities. As clinical evidence continues to accumulate, focused ultrasound neuromodulation is expected to gradually expand from research applications toward therapeutic medical applications.

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Regional Insights

North America represents the leading regional market due to its strong neuroscience research foundation, advanced medical device ecosystem and concentration of early-stage technology developers. Europe maintains strengths in medical imaging, neuroscience research and translational applications. Asia-Pacific, particularly China, represents an emerging growth region driven by increasing investment in brain science, artificial intelligence and medical technology innovation. Japan and South Korea have strong ultrasound and medical device capabilities but currently have limited confirmed commercial suppliers in focused ultrasound neuromodulation.

Competitive Landscape Analysis

The global competitive landscape remains highly concentrated, with supply mainly centered in North America and Israel. The market is characterized by a limited number of specialized technology companies and emerging innovators rather than large-scale medical device manufacturers. Regional competition mainly focuses on ultrasound engineering capabilities, neural targeting accuracy, clinical collaboration networks and regulatory progress. North America currently leads commercialization activities, while Asia-Pacific companies are mainly positioned in technology development and future market entry.

Report Scope

This report studies the global Focused Ultrasound Neuromodulation System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Focused Ultrasound Neuromodulation System and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Focused Ultrasound Neuromodulation System that contribute to its increasing demand across many markets.

Highlights and key features of the study

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Global Focused Ultrasound Neuromodulation System total production and demand, 2021-2032, (Units)

Global Focused Ultrasound Neuromodulation System total production value, 2021-2032, (USD Million)

Global Focused Ultrasound Neuromodulation System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Focused Ultrasound Neuromodulation System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Focused Ultrasound Neuromodulation System domestic production, consumption, key domestic manufacturers and share

Global Focused Ultrasound Neuromodulation System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Focused Ultrasound Neuromodulation System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Focused Ultrasound Neuromodulation System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Focused Ultrasound Neuromodulation System market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Insightec, Sonic Concepts Inc., BrainSonix Corporation, Soterix Medical, SPIRE Bioventures, Attune Neurosciences, Grey Matter Neurosciences, Huachao Neurocontrol Technology Co., Ltd., Kongshan Ci Technology Co., Ltd., Huakang Chaonao Technology Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices

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used in analyzing the World Focused Ultrasound Neuromodulation System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (K US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Focused Ultrasound Neuromodulation System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Focused Ultrasound Neuromodulation System Market, Segmentation by Type:

Complete Neuromodulation System

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Transducer-based Neuromodulation Platform

Wearable Focused Ultrasound System

Others

Global Focused Ultrasound Neuromodulation System Market, Segmentation by Technology Route:

Low Intensity Focused Ultrasound (LIFU)

Transcranial Focused Ultrasound Stimulation (tFUS)

Phased Array Ultrasound Neuromodulation

Single-element Focused Ultrasound

Others

Global Focused Ultrasound Neuromodulation System Market, Segmentation by System Configuration:

Image-guided Neuromodulation System

Neuronavigation-guided System

Closed-loop Neuromodulation System

Open-loop Neuromodulation System

Others

Global Focused Ultrasound Neuromodulation System Market, Segmentation by Application:

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Neuroscience Research

Psychiatric Disorder Neuromodulation Research

Neurological Disease Research

Pain Management Research

Brain Computer Interface Research

Others

Companies Profiled:

Insightec

Sonic Concepts Inc.

BrainSonix Corporation

Soterix Medical

SPIRE Bioventures

Attune Neurosciences

Grey Matter Neurosciences

Huachao Neurocontrol Technology Co., Ltd.

Kongshan Ci Technology Co., Ltd.

Huakang Chaonao Technology Co., Ltd.

Gestalt Technology Co., Ltd.

HIFUPlex Co., Ltd.

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Key Questions Answered

1. How big is the global Focused Ultrasound Neuromodulation System market?
2. What is the demand of the global Focused Ultrasound Neuromodulation System market?
3. What is the year over year growth of the global Focused Ultrasound Neuromodulation System market?
4. What is the total value of the global Focused Ultrasound Neuromodulation System market?
5. Who are the Major Players in the global Focused Ultrasound Neuromodulation System market?
6. What are the growth factors driving the market demand?

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