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Global Histotripsy System Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Histotripsy System market size was valued at US$ 28.81 million in 2025 and is forecast to a readjusted size of US$ 150 million by 2032 with a CAGR of 24.5% during review period.

Histotripsy System is an emerging non-invasive therapeutic ultrasound system based on high-amplitude, short-pulse focused ultrasound technology. By generating controlled acoustic cavitation within targeted tissue regions, the system induces the formation, expansion, and rapid collapse of microbubbles, creating localized mechanical stresses that fragment, liquefy, and remove diseased tissues. Unlike conventional high-intensity focused ultrasound (HIFU), radiofrequency ablation, and microwave ablation technologies that primarily rely on thermal effects to induce coagulative necrosis, Histotripsy utilizes mechanical tissue disruption mechanisms to achieve precise treatment while reducing the risk of thermal damage to surrounding healthy tissues.A Histotripsy System typically consists of high-performance therapeutic ultrasound transducer arrays, ultrasound pulse control modules, real-time imaging guidance systems, treatment planning software, patient positioning and motion control systems, acoustic coupling components, and safety monitoring modules. Through multimodal imaging guidance and intelligent control algorithms, the system enables accurate treatment targeting, real-time monitoring of tissue response, and optimization of treatment precision and safety. Advanced systems further integrate robotic-assisted positioning, automated treatment path planning, and artificial intelligence algorithms to improve treatment capabilities in anatomically complex regions and enhance clinical workflow efficiency.

Key FindingsThe average selling price of global Histotripsy System was approximately

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US$0.8–1.5 million per unit in 2025.The overall industry gross margin was approximately 40%–60%.Liver tumor treatment is currently the largest application segment.North America maintains the leading position in global demand.Japan and China are becoming important emerging markets for technology development and commercialization.

Market Trends

Histotripsy is developing as a new generation of non-invasive mechanical ablation technology within the focused ultrasound field. Unlike conventional thermal ablation approaches, Histotripsy relies on controlled acoustic cavitation to mechanically disrupt targeted tissue, creating differentiated clinical value in situations where minimizing thermal damage is important. The industry is gradually moving from technology validation toward broader clinical adoption, with development activities expanding from liver tumors toward kidney tumors, pancreatic tumors, prostate applications and other solid tumors. Advances in real-time imaging guidance, robotic positioning, treatment automation and acoustic control are expected to improve treatment precision and expand potential clinical applications.

Market Dynamics

Drivers

The increasing demand for minimally invasive cancer treatment technologies is a major driver for Histotripsy adoption. Growing interest in non-radiation and non-invasive tumor treatment approaches, combined with improvements in ultrasound imaging, robotics and treatment planning software, is supporting technology commercialization. Expansion of clinical evidence and additional regulatory approvals are expected to accelerate hospital adoption. The high-value medical device characteristics, with system prices generally reaching approximately US$0.8–1.5 million per unit, also support attractive economics for specialized suppliers.

Restraints

The market is constrained by limited commercial availability, high initial capital investment requirements and the early stage of clinical adoption. Hospital purchasing decisions require substantial clinical validation, physician training and workflow

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integration. Compared with established surgical, radiotherapy and thermal ablation technologies, Histotripsy still requires broader long-term clinical evidence across multiple tumor types.

Opportunities

Expansion into additional solid tumor applications represents the largest future opportunity. Kidney tumor treatment, pancreatic cancer treatment and other difficult-to-treat tumors may provide significant growth potential as clinical trials progress. Emerging markets in Asia, particularly China and Japan, also provide opportunities as healthcare systems increasingly evaluate advanced non-invasive cancer treatment technologies.

Challenges

The industry faces challenges related to regulatory expansion, reimbursement establishment, clinical acceptance and manufacturing scalability. Because the technology remains relatively new, long-term comparative clinical outcomes and cost-effectiveness data will influence future adoption speed. Increasing competition from alternative ablation technologies may also affect market development.

Industry Chain Analysis

The Histotripsy System industry chain consists of upstream precision component suppliers, midstream medical device developers and downstream healthcare providers. Upstream suppliers provide high-performance ultrasound transducers, acoustic materials, electronic control components, imaging modules and precision mechanical systems. Midstream companies integrate therapeutic ultrasound hardware, software algorithms, imaging guidance and treatment platforms into complete clinical systems. Downstream demand mainly comes from cancer centers, tertiary hospitals and academic medical centers seeking advanced non-invasive tumor treatment solutions.

Value Chain Analysis

Value creation is concentrated in technology development, acoustic system design, clinical validation and regulatory approval. The highest-value segments include therapeutic transducer engineering, treatment control algorithms, imaging integration

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and clinical workflow optimization. Due to the complexity of acoustic control and regulatory requirements, Histotripsy system manufacturers maintain relatively high technology barriers and gross margin potential.

Segment Insights

Commercial clinical Histotripsy systems currently dominate market value because they represent the only mature commercialization stage. By application, liver tumor treatment remains the primary revenue contributor, while kidney and pancreatic tumor applications are expected to become important growth areas. From a technology perspective, cavitation cloud Histotripsy remains the most commercially relevant route, while boiling Histotripsy and other advanced approaches are mainly positioned in development pipelines.

Downstream Market Opportunities

Cancer treatment centers and advanced hospitals represent the primary downstream opportunity due to their ability to absorb high-value capital equipment and conduct innovative therapy programs. As clinical indications expand, regional oncology networks and specialized treatment centers may become additional adoption channels.

Regional Insights

North America currently represents the leading regional market due to earlier commercialization, regulatory progress and concentrated clinical research capabilities. Europe has strong focused ultrasound research capabilities but remains at an earlier adoption stage for Histotripsy systems. Asia Pacific, particularly Japan and China, is expected to experience faster technology introduction as medical device innovation and advanced cancer treatment investment continue to increase.

Competitive Landscape Analysis

The competitive landscape is highly concentrated and remains dominated by specialized technology developers rather than diversified medical device groups. North America currently has the strongest competitive position due to early commercialization advantages, while Japan and China represent important emerging innovation regions. Future competition is expected to focus on expanding clinical indications, improving

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treatment automation, developing compact system architectures and increasing global regulatory coverage.

Report Scope

This report is a detailed and comprehensive analysis for global Histotripsy System market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Technology Route and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Histotripsy System market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (K US$/Unit), 2021-2032

Global Histotripsy System market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Units), and average selling prices (K US$/Unit), 2021-2032

Global Histotripsy System market size and forecasts, by Technology Route and by Application, in consumption value ($ Million), sales quantity (Units), and average selling prices (K US$/Unit), 2021-2032

Global Histotripsy System market shares of main players, shipments in revenue ($ Million), sales quantity (Units), and ASP (K US$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Histotripsy System

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To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Histotripsy System market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include HistoSonics, Inc., SONIRE Therapeutics Inc., Petal Surgical, Inc., Sound Blade Medical Inc., Arrayus Technologies Inc., Yisheng Medical, etc.

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

Histotripsy System market is split by Technology Route and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Technology Route, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Technology Route

Cavitation Cloud Histotripsy

Boiling Histotripsy

Microtripsy

Hybrid Histotripsy

Others

Market segment by System Configuration

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Integrated Treatment System

Robotic Assisted Histotripsy System

Image Guided Histotripsy System

Portable Histotripsy System

Others

Market segment by Application

Liver Tumor Treatment

Kidney Tumor Treatment

Pancreatic Tumor Treatment

Prostate Treatment

Others

Major players covered

HistoSonics, Inc.

SONIRE Therapeutics Inc.

Petal Surgical, Inc.

Sound Blade Medical Inc.

Arrayus Technologies Inc.

Yisheng Medical

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Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Histotripsy System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Histotripsy System, with price, sales quantity, revenue, and global market share of Histotripsy System from 2021 to 2026.

Chapter 3, the Histotripsy System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Histotripsy System breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Technology Route and by Application, with sales market share and growth rate by Technology Route, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Histotripsy System market forecast, by regions, by Technology Route, and by Application, with sales and revenue, from 2027 to 2032.

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Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Histotripsy System.

Chapter 14 and 15, to describe Histotripsy System sales channel, distributors, customers, research findings and conclusion.

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