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Global Medical Ultrasound Imaging ASIC Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Medical Ultrasound Imaging ASIC market size is expected to reach $ 1052 million by 2032, rising at a market growth of 8.5% CAGR during the forecast period (2026-2032).

Medical Ultrasound Imaging ASIC refers to application-specific integrated circuits and highly integrated semiconductor devices designed for the signal generation, acquisition, conversion, switching, beamforming, processing and control functions of medical ultrasound imaging systems. The research scope focuses on packaged chips, bare dies, system-in-package devices and customized ASIC solutions used in ultrasound consoles, compact systems, handheld scanners, catheter-based devices, wearable platforms and intelligent probes. Typical product forms include high-voltage transmitter and pulser ASICs, receive analog front ends, transmit/receive switches, high-voltage multiplexers, beamforming processors, signal-control ASICs and integrated ultrasound SoCs. Key technical parameters include channel count, input noise, dynamic range, gain range, sampling performance, transmit voltage, switching speed, power consumption, package dimensions and compatibility with piezoelectric, CMUT or pMUT transducers. These devices convert low-voltage digital control signals into precise high-voltage excitation pulses, amplify and digitize weak echo signals, select transducer elements, coordinate multi-channel timing and support real-time image formation. The study applies a narrow professional scope centered on semiconductor products specifically designed or customized for medical ultrasound imaging applications.

Key Findings

The validated core formal list contains 11 parent-level Medical Ultrasound

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Imaging ASIC suppliers

Six companies provide standardized commercial ultrasound ICs, two provide custom ASICs and three operate proprietary internal chip platforms

Commercial product coverage centers on receive AFEs, high-voltage transmitters, T/R switches, multiplexers and integrated ultrasound SoCs

Handheld, catheter-based and matrix-probe systems represent the clearest incremental opportunities for higher semiconductor integration

Supply remains concentrated while technology routes diversify across piezoelectric, CMUT and pMUT transducer architectures

Market Trends

The development of Medical Ultrasound Imaging ASIC is moving from discrete signal-chain components toward higher functional integration, lower power consumption and closer coupling between the semiconductor and the transducer. In conventional equipment, improvements continue to focus on lower-noise receive AFEs, higher-density channels, more precise high-voltage transmission, faster switching and reduced board area. In compact and handheld systems, product design increasingly combines transmit, receive, conversion, control and partial beamforming functions within fewer devices, reducing power, size and interconnect complexity. Probe-level integration is also becoming more important as matrix transducers, catheter-based probes and high-element-count arrays require local multiplexing, signal conditioning and data reduction. At the same time, CMUT-on-CMOS and pMUT-based architectures are expanding the role of semiconductor manufacturing from signal processing into acoustic transduction, enabling wafer-level production, broader frequency coverage and software-configurable imaging functions. The long-term direction is therefore not simply greater channel count, but a more integrated, power-efficient and application-specific imaging architecture that combines transducer technology, mixed-signal circuitry, digital processing and system software.

Market Dynamics

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Drivers

Demand for Medical Ultrasound Imaging ASIC is supported by the continued expansion of real-time, non-ionizing diagnostic imaging and by the migration of ultrasound from centralized imaging departments toward point-of-care and portable use. Higher integration allows equipment developers to reduce circuit-board area, power consumption, probe weight and system cost while maintaining image quality and multi-mode functionality. Growth in channel density, Doppler capability, volumetric imaging and intelligent image acquisition also increases the semiconductor content required in each system. For handheld and compact platforms, dedicated AFEs, high-voltage pulsers, switching devices and integrated transceivers are especially important because conventional discrete architectures are difficult to accommodate within strict thermal and size constraints. Demand is further reinforced by equipment manufacturers seeking longer product availability, stable supply, reusable semiconductor platforms and faster development cycles across multiple ultrasound product families.

Restraints

Market expansion is constrained by high development expenditure, relatively long design-in cycles and the limited production scale of many customized medical ASIC programs. Medical ultrasound chips combine low-noise analog acquisition, high-voltage transmission, fast switching, precise timing and digital processing, creating complex trade-offs among image quality, power, die area, package performance and cost. Customized devices may require substantial non-recurring engineering expenditure, dedicated masks, specialized analog or high-voltage processes and application-specific verification before commercial production. Semiconductor qualification must also align with the longer lifecycle, traceability and reliability expectations of medical equipment programs. In addition, specialized chip demand is concentrated among a limited number of ultrasound system and probe manufacturers, which can restrict volume scalability and increase dependence on individual design wins. These factors make economic production more difficult for highly customized, low-volume products than for standardized commercial components.

Opportunities

The most attractive opportunities arise where conventional board-level electronics can be transferred closer to the probe or consolidated into a customized mixed-signal device. High-element-count matrix probes require compact multiplexing, local signal

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conditioning and efficient data transmission, while catheter-based ultrasound, intracardiac echocardiography and intravascular ultrasound require extremely small packages and low-power front ends. Handheld systems create demand for integrated transceivers, multi-function AFEs and semiconductor-based probes capable of supporting several imaging modes with one device. Wearable and patch ultrasound may create a further opportunity for ultra-low-power ASICs, although commercial volumes remain less established. CMUT- and pMUT-compatible ASICs also provide opportunities for co-designed transducer and electronics platforms, allowing wafer-level integration and differentiated probe architectures. Suppliers with reusable medical analog IP, high-voltage process capability and experience managing customized silicon programs are positioned to address these emerging applications.

Challenges

The industry faces persistent challenges in balancing imaging performance, power efficiency, package size, product longevity and commercial scale. Ultrasound front ends must process weak echo signals in close proximity to high-voltage transmit pulses, making isolation, recovery time, noise suppression and thermal management critical. The absence of a single standardized architecture across cart-based systems, handheld devices, matrix probes and catheter platforms limits the reuse of some customized designs. New transducer technologies also require close co-development among semiconductor designers, probe manufacturers, system developers and imaging-software teams, increasing project coordination risk. Commercial success depends on securing long-duration design wins, achieving stable manufacturing yield and maintaining supply continuity over medical equipment lifecycles. Regulatory changes at the system or transducer level can additionally require design documentation and verification updates even when the ASIC itself is not marketed as a standalone medical device.

Industry Chain Analysis

The upstream industry chain comprises semiconductor IP, EDA tools, analog and high-voltage process technologies, silicon wafers, specialty foundry capacity, packaging substrates, wafer-level packaging and semiconductor testing. Medical ultrasound applications place particular value on low-noise analog processes, high-voltage device integration, accurate matching, high-density interconnect and packages capable of controlling electrical parasitics. Depending on the supplier model, wafer fabrication may

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be completed internally by an IDM or outsourced by a fabless and custom ASIC provider, while assembly and testing are frequently performed through specialized external partners. The need to combine high-voltage transmit circuits with sensitive receive electronics means that process selection and package architecture have a direct influence on performance, yield and total device cost.

The midstream consists of standardized medical semiconductor suppliers, custom ASIC design-and-supply companies and ultrasound system or probe manufacturers with proprietary internal chip platforms. Value is created through ultrasound-specific architecture, reusable circuit IP, transducer-electronics co-design, mixed-signal verification, manufacturing control and long-term supply support. Downstream integration occurs in cart-based systems, compact scanners, handheld devices, intelligent probes, matrix arrays and catheter-based imaging platforms. Development cost is concentrated in engineering labor, IP, masks, validation and qualification, while unit cost is determined by die size, process node, wafer yield, package complexity and testing requirements. Profitability is generally stronger when a design platform can be reused across multiple customers or product generations, whereas one-off low-volume programs face greater pressure to recover non-recurring engineering investment.

Segment Insights

By product type, the most established commercial segments are receive analog front ends and high-voltage transmit-and-switch devices. Receive AFEs integrate low-noise amplification, variable gain, filtering and analog-to-digital conversion, while the transmit chain contains pulsers, transmit/receive switches and high-voltage multiplexers. These categories remain central to conventional cart-based, compact and portable ultrasound architectures. Beamforming ASICs and highly integrated ultrasound SoCs form a more customized segment because their architecture is closely linked to system software, channel configuration and proprietary imaging algorithms. Their unit volumes may be less transparent, but their semiconductor value per design is generally higher because they replace multiple discrete functions and reduce downstream system complexity.

By integration level, single-function ASICs retain an important role where equipment manufacturers require design flexibility, while multi-function front ends and highly integrated SoCs are gaining relevance in power- and space-constrained equipment. By transducer compatibility, piezoelectric-compatible chips continue to support the broad installed base, whereas CMUT- and pMUT-compatible ASICs represent the more differentiated technology opportunity. By channel count, higher-density solutions benefit

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matrix and advanced imaging platforms, while lower- and medium-channel devices are better aligned with compact, catheter-based and multiplexed systems. The highest-value opportunities are therefore associated with products that simultaneously improve integration, channel density, power efficiency and transducer compatibility rather than with channel expansion alone.

Downstream Market Opportunities

Downstream opportunities are increasingly determined by equipment form factor and probe architecture. Cart-based ultrasound remains an important source of demand for high-performance, high-channel-count AFEs and advanced transmit electronics, while compact systems require similar imaging capability within tighter power and board-space limits. Handheld ultrasound represents a visible incremental opportunity because semiconductor integration can replace multiple probes or circuit boards with a smaller, software-configurable platform. Matrix probes create demand for local multiplexing and probe-level electronics, and catheter-based applications require miniaturized high-voltage and low-noise circuits positioned close to the transducer. Wearable and home-oriented ultrasound could extend the addressable application base over the longer term, but opportunities will depend on clinical validation, workflow integration and regulatory acceptance rather than semiconductor capability alone.

Regional Insights

From a supply-side perspective, North America forms the densest cluster within the validated core formal list, supported by established analog semiconductor companies and emerging semiconductor-based ultrasound platforms. The region combines standardized medical AFEs, high-voltage devices, multiplexers and proprietary probe-chip architectures. Europe has a smaller but diversified supplier base covering standard ultrasound ICs, custom medical ASIC services and internally developed matrix-probe technologies. Japan maintains a specialized position in high-voltage transmit and receive solutions, strengthened by the transfer and integration of medical ultrasound semiconductor assets.

Asia also plays a broader role in semiconductor fabrication, packaging, system manufacturing and ultrasound equipment production. China is developing capabilities in customized ultrasound IC design and silicon-based transducer integration, although the number of independently verified commercial suppliers remains below that of North

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America. Regional opportunity therefore differs by function: North America and Europe are stronger in product definition, analog IP and proprietary platforms; Japan retains high-voltage and medical semiconductor specialization; and the wider Asian supply chain provides manufacturing scale, packaging capability and proximity to ultrasound equipment production. These roles are complementary because chip design headquarters, wafer fabrication, packaging and final system integration are frequently located in different countries.

Competitive Landscape Analysis

The Medical Ultrasound Imaging ASIC market has a concentrated but multilayered competitive structure. Standardized commercial IC supply is concentrated among established analog semiconductor groups with proven capabilities in low-noise acquisition, high-voltage transmission, switching, data conversion and long-term product support. Within the validated manufacturer pool, Texas Instruments, Analog Devices, STMicroelectronics, MinebeaMitsumi, Microchip Technology and Monolithic Power Systems participate through commercially available ultrasound-focused product portfolios, although their functional coverage differs. A second competitive layer consists of custom ASIC providers such as the SEALSQ-controlled IC'Alps business and Sonosilicon, which compete through application-specific integration, reusable medical IP and close cooperation with probe or equipment developers. A third layer comprises Philips, Butterfly Network and Exo Imaging, where proprietary semiconductor platforms primarily support differentiated probes and imaging systems rather than open-market component sales. Competition therefore does not depend solely on chip price or corporate scale. The principal barriers are ultrasound-specific analog performance, high-voltage process capability, system-level design knowledge, manufacturing reliability, medical product lifecycle support and established customer design-ins. Recent transactions, including MinebeaMitsumi's integration of Socionext's medical ultrasound business and SEALSQ's acquisition of IC'Alps, indicate that companies are strengthening portfolios through complementary receive technology, custom ASIC expertise and broader design-to-supply capabilities.

Report Scope

This report studies the global Medical Ultrasound Imaging ASIC production, demand, key manufacturers, and key regions.

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This report is a detailed and comprehensive analysis of the world market for Medical Ultrasound Imaging ASIC 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 Medical Ultrasound Imaging ASIC that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Medical Ultrasound Imaging ASIC total production and demand, 2021-2032, (Million Units)

Global Medical Ultrasound Imaging ASIC total production value, 2021-2032, (USD Million)

Global Medical Ultrasound Imaging ASIC production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Medical Ultrasound Imaging ASIC consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Medical Ultrasound Imaging ASIC domestic production, consumption, key domestic manufacturers and share

Global Medical Ultrasound Imaging ASIC production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Medical Ultrasound Imaging ASIC production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Medical Ultrasound Imaging ASIC production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Medical Ultrasound Imaging ASIC market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key

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companies covered as a part of this study include Texas Instruments Incorporated, Analog Devices, Inc., STMicroelectronics N.V., MinebeaMitsumi Inc., Microchip Technology Incorporated, Monolithic Power Systems, Inc., SEALSQ Corp, Koninklijke Philips N.V., Butterfly Network, Inc., Exo Imaging, Inc., 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 used in analyzing the World Medical Ultrasound Imaging ASIC market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Million Units) and average price (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 Medical Ultrasound Imaging ASIC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Medical Ultrasound Imaging ASIC Market, Segmentation by Type:

High-Voltage Transmitter ASIC

Receive Analog Front-End ASIC

T/R Switch and Multiplexer ASIC

Beamforming ASIC

Integrated Ultrasound ASIC / SoC

Other Specialized ASIC

Global Medical Ultrasound Imaging ASIC Market, Segmentation by Integration Level:

Single-Function ASIC

Multi-Function Front-End ASIC

Highly Integrated Ultrasound SoC

Global Medical Ultrasound Imaging ASIC Market, Segmentation by Transducer Compatibility:

Piezoelectric Transducer ASIC

CMUT-Compatible ASIC

PMUT-Compatible ASIC

Other Transducer ASIC

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Global Medical Ultrasound Imaging ASIC Market, Segmentation by Channel Count:

1–8 Channels

9–32 Channels

33–64 Channels

65–128 Channels

More Than 128 Channels

Global Medical Ultrasound Imaging ASIC Market, Segmentation by Application:

Cart-Based Ultrasound Systems

Handheld Ultrasound Systems

Catheter-Based Ultrasound Systems

Wearable and Patch Ultrasound Systems

Other

Companies Profiled:

Texas Instruments Incorporated

Analog Devices, Inc.

STMicroelectronics N.V.

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MinebeaMitsumi Inc.

Microchip Technology Incorporated

Monolithic Power Systems, Inc.

SEALSQ Corp

Koninklijke Philips N.V.

Butterfly Network, Inc.

Exo Imaging, Inc.

Sonosilicon

Key Questions Answered

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

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