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Global Medical Ultrasound Imaging ASIC 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 Medical Ultrasound Imaging ASIC market size was valued at US$ 595 million in 2025 and is forecast to a readjusted size of US$ 1052 million by 2032 with a CAGR of 8.5% during review period.

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

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The validated core formal list contains 11 parent-level Medical Ultrasound 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 is a detailed and comprehensive analysis for global Medical Ultrasound Imaging ASIC market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is

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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 Medical Ultrasound Imaging ASIC market size and forecasts, in consumption value ($ Million), sales quantity (Million Units), and average selling prices (US$/Unit), 2021-2032

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

Global Medical Ultrasound Imaging ASIC market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Million Units), and average selling prices (US$/Unit), 2021-2032

Global Medical Ultrasound Imaging ASIC market shares of main players, shipments in revenue ($ Million), sales quantity (Million Units), and ASP (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 Medical Ultrasound Imaging ASIC

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 Medical Ultrasound Imaging ASIC 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 Texas Instruments Incorporated,

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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.

Medical Ultrasound Imaging ASIC market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, 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 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

Market segment by Integration Level

Single-Function ASIC

Multi-Function Front-End ASIC

Highly Integrated Ultrasound SoC

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Market segment by Transducer Compatibility

Piezoelectric Transducer ASIC

CMUT-Compatible ASIC

PMUT-Compatible ASIC

Other Transducer ASIC

Market segment by Channel Count

1–8 Channels

9–32 Channels

33–64 Channels

65–128 Channels

More Than 128 Channels

Market segment by Application

Cart-Based Ultrasound Systems

Handheld Ultrasound Systems

Catheter-Based Ultrasound Systems

Wearable and Patch Ultrasound Systems

Other

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Major players covered

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.

Sonosilicon

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)

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Chapter Outline

Chapter 1, to describe Medical Ultrasound Imaging ASIC product scope, market overview, market estimation caveats and base year.
Chapter 2, to profile the top manufacturers of Medical Ultrasound Imaging ASIC, with price, sales quantity, revenue, and global market share of Medical Ultrasound Imaging ASIC from 2021 to 2026.
Chapter 3, the Medical Ultrasound Imaging ASIC competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.
Chapter 4, the Medical Ultrasound Imaging ASIC 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 Type and by Application, with sales market share and growth rate by Type, 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 Medical Ultrasound Imaging ASIC market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.
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 Medical Ultrasound Imaging ASIC.
Chapter 14 and 15, to describe Medical Ultrasound Imaging ASIC sales channel, distributors, customers, research findings and conclusion.

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