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Global Musculoskeletal Ultrasound Systems 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 Musculoskeletal Ultrasound Systems market size was valued at US$ 1091 million in 2025 and is forecast to a readjusted size of US$ 1551 million by 2032 with a CAGR of 5.1% during review period.

Musculoskeletal Ultrasound Systems are medical ultrasound imaging devices designed or configured for real-time assessment of muscles, tendons, ligaments, joints, bursae, fascia, cartilage and peripheral nerves, as well as ultrasound-guided musculoskeletal procedures. The study covers cart-based, laptop, tablet and handheld systems with dedicated MSK presets, high-frequency linear transducers, musculoskeletal workflow functions or clearly defined clinical positioning in orthopedics, sports medicine, rheumatology, pain medicine, anesthesiology, physical medicine and rehabilitation, emergency care, radiology and general ultrasound. Product capability ranges from conventional high-frequency imaging to very-high-frequency superficial imaging above 20 MHz, with selected platforms supporting frequencies of approximately 20–25 MHz for small joints, tendons, superficial nerves and other fine structures. Current systems increasingly integrate Doppler imaging, panoramic imaging, bilateral comparison, needle enhancement, nerve recognition, examination guidance and AI-assisted workflow functions to support both diagnostic assessment and image-guided intervention.

Key Findings

Global Musculoskeletal Ultrasound Systems sales were approximately 51.7

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thousand units in 2025 and are estimated at 55.2 thousand units in 2026

The blended ASP was approximately US$20,500 per unit in 2025 and is estimated near US$20,300 per unit in 2026

Handheld systems represent the largest unit-volume product form in the study model at roughly the mid-40% range

Orthopedics and sports medicine remain the primary application base while rheumatology pain medicine and rehabilitation broaden point-of-care adoption

Market Trends

The Musculoskeletal Ultrasound Systems market is shifting from conventional department-based ultrasound toward a broader point-of-care imaging model. Product development is moving simultaneously in three directions: greater portability, higher superficial-image resolution and stronger workflow automation. Handheld and compact systems are increasingly designed with dedicated MSK presets and mobile-device connectivity, enabling examinations in orthopedic clinics, sports medicine facilities, rehabilitation departments and field settings. At the performance end, manufacturers are extending high-frequency linear transducer capability toward 20 MHz and above, with selected very-high-frequency probes reaching approximately 25 MHz for fingers, wrists, superficial tendons, cartilage and peripheral nerves. AI is being incorporated primarily as a workflow and procedural assistance layer rather than as a replacement for clinical interpretation, including nerve detection, anatomical guidance, exam standardization and needle visualization. These developments are narrowing the usability gap between traditional premium ultrasound systems and portable platforms while allowing MSK ultrasound to move closer to the physician, therapist and procedure room.

Market Dynamics

Drivers

Demand is supported by the large and persistent global burden of musculoskeletal disorders, the growing need for rehabilitation and the clinical suitability of ultrasound for dynamic, repeatable and real-time examination. Musculoskeletal conditions affect approximately 1.71 billion people worldwide and are a major source of rehabilitation

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demand, providing a broad clinical foundation for imaging and follow-up. At the device level, MSK ultrasound supports tendon, ligament, muscle, joint and peripheral nerve evaluation while enabling injections, aspirations and nerve-related procedures under real-time visualization. The expansion of sports medicine, outpatient orthopedics, pain management and rehabilitation therefore increases the number of clinical settings in which a dedicated or MSK-configured ultrasound system can be economically justified. Portability further lowers deployment barriers by moving imaging from centralized radiology departments into specialty clinics and procedure rooms.

Restraints

Market penetration remains constrained by operator dependence, training requirements and substantial variation in equipment configuration and clinician experience. High-quality MSK ultrasound requires both anatomical knowledge and probe-handling skills, particularly for small nerves, complex tendon pathology and image-guided procedures. Premium systems equipped with very-high-frequency transducers, advanced Doppler, needle enhancement and AI-assisted functions also carry materially higher acquisition costs than entry-level handheld products, creating a wide ASP range and different procurement thresholds across customer groups. In addition, ultrasound does not fully replace other imaging modalities in every clinical situation, particularly where deep structures, complex internal joint anatomy or broader cross-sectional assessment are required. These factors limit the conversion of the entire musculoskeletal patient population into addressable ultrasound equipment demand and place continued emphasis on training, workflow simplification and appropriate clinical positioning.

Opportunities

The strongest opportunities are emerging where portability and procedural guidance create new ultrasound users rather than simply replacing existing cart-based systems. Rehabilitation medicine, outpatient sports medicine, rheumatology, pain clinics and decentralized orthopedic practices can use compact or handheld systems for repeated follow-up, dynamic assessment and guided procedures at the point of care. Very-high-frequency imaging creates an additional premium opportunity in small-joint rheumatology, superficial nerve imaging, hand and wrist assessment and detailed tendon evaluation. AI-supported anatomical guidance and examination protocols may also improve accessibility for clinicians who are not full-time sonographers, expanding the usable customer base while supporting examination consistency. The combination of lower-cost handheld hardware and higher-value software, workflow and AI functions

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is likely to create multiple commercial models ranging from capital equipment purchasing to recurring software and service revenue.

Challenges

Long-term industry development will depend on balancing accessibility with clinical quality. Rapid expansion of handheld systems increases price competition and broadens the supplier base, but image quality, transducer durability, software support, cybersecurity, regulatory clearance and after-sales service remain important differentiators. AI-related features create additional commercialization complexity because availability and regulatory status can differ by market, limiting the ability to deploy identical software packages globally. The industry must also address examination standardization and user competency as MSK ultrasound expands beyond radiology and specialist sonography departments. Manufacturers that broaden distribution without sufficient clinical education may face slower utilization after initial equipment deployment, while companies investing heavily in advanced platforms must demonstrate that higher-frequency imaging, workflow automation and procedural tools generate enough clinical value to support premium pricing.

Industry Chain Analysis

The upstream industry chain for Musculoskeletal Ultrasound Systems centers on ultrasound transducers, piezoelectric and semiconductor-based sensing technologies, beamforming and signal-processing electronics, processors, displays, batteries, mechanical housings, cables and medical-grade software components. High-frequency and very-high-frequency linear transducers are particularly important because superficial resolution directly influences performance in tendons, ligaments, small joints and peripheral nerves. Midstream manufacturers integrate these components into cart-based, laptop, tablet and handheld platforms and differentiate products through image-processing algorithms, probe portfolios, Doppler performance, clinical presets, examination guidance, AI tools and needle-visualization functions. Product value therefore depends increasingly on the integration of hardware, transducer performance and clinical workflow rather than on the ultrasound console alone.

Downstream demand is distributed across orthopedics and sports medicine, rheumatology, pain medicine and anesthesiology, physical medicine and rehabilitation, emergency and acute care, and radiology and general ultrasound. The commercial

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chain generally extends from manufacturers through direct hospital sales, regional distributors and specialized medical-device channels to hospitals, specialty clinics, ambulatory practices and individual point-of-care users. Premium cart and laptop systems generate higher hardware value per installation, while handheld systems expand unit volume and increase the importance of software, subscriptions, connectivity, education and lifecycle services. As hardware becomes more portable, a larger share of competitive differentiation is shifting toward transducer capability, clinical applications, software ecosystems and post-sale user support.

Segment Insights

By product type, handheld systems represent the largest unit-volume category in the study model, accounting for roughly the mid-40% range of shipments, followed by laptop systems at around 30%. Cart-based systems contribute a smaller share of unit volume but remain important in higher-value configurations, while tablet systems occupy a more specialized position between conventional portable equipment and fully handheld products. This structure explains why market value does not move in direct proportion to unit shipments: lower-priced handheld products increase system penetration, whereas premium laptop and cart-based systems continue to carry substantially higher ASPs. Product development increasingly emphasizes compact architecture without sacrificing advanced imaging or procedural capabilities.

By technical specification, systems supporting MSK linear transducers of 15 MHz and below remain widely applicable to routine muscle, tendon and larger-joint imaging; products above 15 MHz through 20 MHz address more detailed superficial structures; and systems above 20 MHz form a higher-resolution technical segment focused on small joints, superficial nerves, cartilage and fine tendon structures. By application, orthopedics and sports medicine form the principal demand base, while rheumatology, pain medicine, anesthesiology and rehabilitation are strategically important expansion areas because they combine diagnostic assessment with repeated follow-up or ultrasound-guided intervention.

Downstream Market Opportunities

Downstream opportunities are increasingly concentrated in clinical settings where ultrasound can shorten the pathway between examination and treatment. Orthopedic and sports medicine practices use MSK ultrasound for rotator cuff, Achilles tendon, patellar tendon, muscle and ligament assessment; rheumatology adds demand for synovitis, small-joint and inflammatory disease monitoring; pain medicine and

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anesthesiology create procedural demand through nerve blocks and image-guided injections; and rehabilitation departments use ultrasound for repeated monitoring of muscle and tendon recovery. Handheld and compact devices are particularly well positioned where mobility, rapid access and room-to-room deployment matter more than a centralized imaging workflow. This broadening of users supports equipment penetration beyond radiology departments and creates an increasingly diversified downstream customer structure.

Regional Insights

North America represents the leading high-value market in this study, supported by established use of point-of-care ultrasound, developed orthopedic and sports medicine networks, broad adoption of ultrasound-guided procedures and a strong base of handheld ultrasound innovators. Europe combines mature hospital ultrasound demand with specialist strength in rheumatology and very-high-frequency MSK imaging. Japan and South Korea maintain strong positions through established diagnostic ultrasound manufacturers and advanced imaging technologies. Asia-Pacific, led by China, represents the broadest incremental expansion opportunity due to its large medical-device manufacturing base, expanding rehabilitation and specialty-care infrastructure and increasing availability of domestically produced portable and handheld systems. China also stands out on the supply side, with a deeper pool of ultrasound OEMs spanning premium systems, specialty MSK platforms and lower-cost handheld products, creating strong price-tier coverage for both domestic and export markets.

Competitive Landscape Analysis

The competitive landscape combines diversified global diagnostic-imaging groups, specialist ultrasound manufacturers and a growing group of handheld and point-of-care technology companies. Large suppliers such as GE HealthCare, Philips, Canon, FUJIFILM, Samsung Medison and Mindray compete through broad probe portfolios, imaging performance, installed service networks and integration of MSK into wider ultrasound platforms. Esaote maintains a differentiated position through long-standing specialization in musculoskeletal and rheumatology imaging and very-high-frequency transducer capability. Handheld-focused companies such as Butterfly Network, Clarius and EchoNous compete on portability, software-centered workflows and point-of-care deployment, increasing pressure on traditional portable-system pricing and usability. Chinese manufacturers including SonoScape, Wisonic, VINNO and CHISON broaden

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competition across premium, specialist and cost-sensitive segments. The market is therefore characterized less by a single dominant product architecture than by competition among imaging quality, portability, clinical workflow, transducer technology, AI-enabled assistance, channel reach and lifecycle service capability.

Report Scope

This report is a detailed and comprehensive analysis for global Musculoskeletal Ultrasound Systems market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type 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 Musculoskeletal Ultrasound Systems market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

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

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

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

The Primary Objectives in This Report Are:

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

To assess the growth potential for Musculoskeletal Ultrasound Systems

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 Musculoskeletal Ultrasound Systems 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 GE HealthCare Technologies Inc., Butterfly Network, Inc., EchoNous, Inc., Exo Imaging, Inc., Vave Health, Teratech Corporation, Clarius Mobile Health, Koninklijke Philips N.V., Siemens Healthineers AG, Esaote S.p.A., etc.

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

Musculoskeletal Ultrasound Systems 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

Cart-based Systems

Laptop Systems

Tablet Systems

Handheld Systems

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Other

Market segment by Maximum MSK Linear Transducer Frequency

15 MHz and Below

Above 15 MHz to 20 MHz

Above 20 MHz

Other

Market segment by Application

Orthopedics and Sports Medicine

Rheumatology

Pain Medicine and Anesthesiology

Physical Medicine and Rehabilitation

Emergency Medicine and Acute Care

Radiology and General Ultrasound

Other

Major players covered

GE HealthCare Technologies Inc.

Butterfly Network, Inc.

EchoNous, Inc.

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Exo Imaging, Inc.

Vave Health

Teratech Corporation

Clarius Mobile Health

Koninklijke Philips N.V.

Siemens Healthineers AG

Esaote S.p.A.

Sonoscanner

TELEMED, UAB

SuperSonic Imagine

eZono AG

Canon Inc.

FUJIFILM Holdings Corporation

Konica Minolta, Inc.

Samsung Medison Co., Ltd.

ALPINION MEDICAL SYSTEMS Co., Ltd.

Healcerion Co., Ltd.

LELTEK INC.

ASUSTeK Computer Inc.

Trivitron Healthcare

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Shenzhen Mindray Bio-Medical Electronics Co., Ltd.

SonoScape Medical Corp.

Shenzhen Wisonic Medical Technology Co., Ltd.

VINNO Technology Suzhou Co., Ltd.

CHISON Medical Technologies Co., Ltd.

Edan Instruments, Inc.

Shantou Institute of Ultrasonic Instruments Co., Ltd.

Wuhan Youkey Bio-Medical Electronics Co., Ltd.

Dawei Medical Jiangsu Co., Ltd.

Jiangsu PeriodMed Technology Co., Ltd.

Beijing Konted Medical Technology Co., Ltd.

Healson Technology Co., Ltd.

Shenzhen Well.d Medical Electronics Co., Ltd.

Viatom Technology Co., Ltd.

Shenzhen Emperor Electronic Technology Co., Ltd.

Guangzhou Sonostar Technologies Co., Limited

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)

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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 Musculoskeletal Ultrasound Systems product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Musculoskeletal Ultrasound Systems 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 Musculoskeletal Ultrasound Systems 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 Musculoskeletal Ultrasound Systems.

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Chapter 14 and 15, to describe Musculoskeletal Ultrasound Systems sales channel, distributors, customers, research findings and conclusion.

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