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Global Musculoskeletal Ultrasound Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Musculoskeletal Ultrasound Systems market size is expected to reach $ 1551 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

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

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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 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

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

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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 chain generally extends from manufacturers through direct hospital sales, regional distributors and specialized medical-device channels to hospitals, specialty clinics,

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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 anesthesiology create procedural demand through nerve blocks and image-guided injections; and rehabilitation departments use ultrasound for repeated monitoring of

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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 competition across premium, specialist and cost-sensitive segments. The market is therefore characterized less by a single dominant product architecture than by

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competition among imaging quality, portability, clinical workflow, transducer technology, AI-enabled assistance, channel reach and lifecycle service capability.

Report Scope

This report studies the global Musculoskeletal Ultrasound Systems production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Musculoskeletal Ultrasound Systems total production and demand, 2021-2032, (Units)

Global Musculoskeletal Ultrasound Systems total production value, 2021-2032, (USD Million)

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

Global Musculoskeletal Ultrasound Systems consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Musculoskeletal Ultrasound Systems domestic production, consumption, key domestic manufacturers and share

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

Global Musculoskeletal Ultrasound Systems production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

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Global Musculoskeletal Ultrasound Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Musculoskeletal Ultrasound Systems 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Musculoskeletal Ultrasound Systems market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (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 Musculoskeletal Ultrasound Systems Market, By Region:

United States

China

Europe

Japan

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South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Musculoskeletal Ultrasound Systems Market, Segmentation by Type:

Cart-based Systems

Laptop Systems

Tablet Systems

Handheld Systems

Other

Global Musculoskeletal Ultrasound Systems Market, Segmentation by Maximum MSK Linear Transducer Frequency:

15 MHz and Below

Above 15 MHz to 20 MHz

Above 20 MHz

Other

Global Musculoskeletal Ultrasound Systems Market, Segmentation by

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Application:

Orthopedics and Sports Medicine

Rheumatology

Pain Medicine and Anesthesiology

Physical Medicine and Rehabilitation

Emergency Medicine and Acute Care

Radiology and General Ultrasound

Other

Companies Profiled:

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.

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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

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.

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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

Key Questions Answered

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

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