

# Global Therapeutic Ultrasound Devices Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Therapeutic Ultrasound Devices market size is expected to reach \$ 9102 million by 2032, rising at a market growth of 7.2% CAGR during the forecast period (2026-2032).

Therapeutic ultrasound devices refer to medical device systems that utilize the mechanical effects, thermal effects, and physicochemical effects of ultrasound to treat human diseases. According to the Medical Device Classification Catalog of the National Medical Products Administration, therapeutic ultrasound devices cover multiple categories, including high-intensity focused ultrasound systems for tumor ablation, surgical ultrasound devices for surgical procedures, ultrasound therapy devices for physical rehabilitation, and focused ultrasound skin treatment devices for aesthetic medicine applications. Their core working principle involves converting electrical energy into ultrasonic energy, which is emitted through transducers at specific frequencies and acoustic intensities to act on human tissues. This produces thermal effects that cause coagulative necrosis of diseased tissues, achieves tissue fragmentation and emulsification through mechanical vibration, or stimulates tissue repair and regeneration through low-intensity ultrasound. From an industrial value perspective, therapeutic ultrasound devices,?? their non-invasive or minimally invasive characteristics, precise targeting capabilities, and favorable safety profiles, have become important technological tools in oncology, surgery, rehabilitation therapy, and medical aesthetics, occupying an increasingly prominent strategic position in the global medical device market.

## Market Development Opportunities and Key Drivers

China has 217 million people aged 65 and above, with deep aging driving rigid growth in

demand for degenerative disease treatments. On the technological innovation front, high-intensity focused ultrasound has achieved breakthroughs. The first human clinical trial in November 2025 showed that the novel HIFU device MS-2 combined with nanomicellar epirubicin for advanced abdominal tumors achieved a disease control rate of 66.7% with no grade 3 or higher adverse events. On the policy front, in February 2026, the National Medical Products Administration approved the country's first intravascular ultrasound guidewire system for interventional treatment of chronic total occlusion of coronary arteries, filling a technological gap.

### Market Challenges and Risks

Core technologies and components for high-end ultrasound equipment have long been dominated by foreign brands, with gaps still existing in the ultra-high-end segment. The escalation of US-China tariff disputes in 2025 saw China impose a 34% tariff on medical imaging equipment from the US, while the US doubled tariffs on Chinese semiconductors to 50%, driving up costs and forcing the acceleration of local supply chain development. In the medical aesthetics field, there have been issues of off-label use and exaggerated claims. Regulators have clarified that focused ultrasound is only approved for fat reduction, while its use for facial wrinkles and skin tightening is not approved, necessitating enhanced compliance.

### Downstream Demand Trends

In the cardiovascular intervention field, the intravascular ultrasound treatment device approved in February 2026 is a domestic first. In medical aesthetics, Peninsula Medical released the country's first Class III focused ultrasound skin treatment device in December 2025, with nearly 6,000 hospitals already covering similar products, driving industry standardization. In oncology, novel modalities such as sonodynamic therapy are expanding, with HIFU combined with sonosensitizers showing potential to improve prognosis for patients with refractory tumors. The demand for ultrasound treatment equipment in primary medical institutions continues to grow with the implementation of the tiered diagnosis and treatment system, but a shortage of specialized talent constrains the effectiveness of technology deployment.

### Regional Trends

North America leads cutting-edge innovation in HIFU, sonodynamic therapy, and other fields with its mature R&D systems, hosting the first human clinical trial of HIFU combined with sonosensitizers in November 2025. Europe maintains its technological

advantages in ultrasound surgical equipment and core component development. The Asia-Pacific region shows the most active growth, with China becoming a global focal point driven by policy support and domestic substitution: domestic ultrasound equipment market share reached 65% in 2025, with Mindray's ultra-high-end ultrasound Resona A20 priced 100% higher than its predecessor and planned for FDA approval in 2025. Of the 281 innovative products approved by the National Medical Products Administration in 2024, 245 were domestic. United Imaging plans to launch its full ultrasound product line at the RSNA conference in December 2025, expanding into overseas markets. Hainan Free Trade Port's zero-tariff policy provides a buffer for imported high-end equipment while simultaneously driving technological iteration.

This report studies the global Therapeutic Ultrasound Devices production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Therapeutic Ultrasound Devices total production and demand, 2021-2032, (Units)

Global Therapeutic Ultrasound Devices total production value, 2021-2032, (USD Million)

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

Global Therapeutic Ultrasound Devices consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Therapeutic Ultrasound Devices domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Therapeutic Ultrasound Devices 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 Zimmer, ZetrOZ, SonaCare Medical, Richmar, Mettler Electronics, DJO Global, Enraf-Nonius, EDAP TMS, BTL Industries, Alpinion, 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 Therapeutic Ultrasound Devices market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (USD/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 Therapeutic Ultrasound Devices Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Therapeutic Ultrasound Devices Market, Segmentation by Type:

Non-Invasive Therapeutic Ultrasound

Minimally Invasive Therapeutic Ultrasound

Intravascular Therapeutic Ultrasound

Global Therapeutic Ultrasound Devices Market, Segmentation by Technology:

Thermal Ablation

Sonodynamic Therapy

Mechanical Vibration

Cavitation

Global Therapeutic Ultrasound Devices Market, Segmentation by Energy Strength:

High Intensity Focused

Medium Intensity Broad-Beam

Low Intensity Pulsed

Global Therapeutic Ultrasound Devices Market, Segmentation by Treatment Mode:

Continuous Mode

Pulsed Mode

Triggered Mode

Global Therapeutic Ultrasound Devices Market, Segmentation by Application:

Oncology

Urology

Cardiovascular

Medical Aesthetics

Musculoskeletal Rehabilitation

Companies Profiled:

Zimmer

ZetrOZ

SonaCare Medical

Richmar

Mettler Electronics

DJO Global

Enraf-Nonius

EDAP TMS

BTL Industries

Alpinion

Theraclion

Sonablate

Insightec

Classys

Profound Medical

EMS Physio

Ito Physical Therapy

Mindray Medical

Peninsula Medical

United Imaging

Sonoscape

Sonka Medical

Wikkon

#### Key Questions Answered:

1. How big is the global Therapeutic Ultrasound Devices market?
2. What is the demand of the global Therapeutic Ultrasound Devices market?
3. What is the year over year growth of the global Therapeutic Ultrasound Devices market?
4. What is the production and production value of the global Therapeutic Ultrasound Devices market?
5. Who are the key producers in the global Therapeutic Ultrasound Devices market?
6. What are the growth factors driving the market demand?

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