

Global Ultrasonic Fetal Monitor 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 Ultrasonic Fetal Monitor market size was valued at US\$ 2909 million in 2025 and is forecast to a readjusted size of US\$ 4152 million by 2032 with a CAGR of 5.3% during review period.

In 2024, global sales of ultrasound fetal monitors reached approximately 1.45 million units, with an average selling price of about US\$1,850 per unit. Ultrasound fetal monitors are perinatal monitoring devices that use Doppler ultrasound to obtain fetal heart rate (FHR) and uterine contraction (TOCO) signals through contact with the maternal abdominal surface. They are widely used for prenatal checkups, labor management, and high-risk pregnancy screening. Upstream raw materials include piezoelectric ultrasound probe wafers (PZT ceramic), flexible cables, main control boards, ultrasound signal amplification and filtering chips, ABS/PC housings, and display screen assemblies. Major suppliers include Fujitsu (Japan), CTS (USA) (piezoelectric ceramics), Texas Instruments and Analog Devices (USA) (signal processing chips), and Evonik/SABIC (Saudi Arabia) (engineering plastics). Downstream customers include hospital obstetrics and gynecology departments, maternal and child health service institutions, and manufacturers of home fetal heart rate monitoring devices. Representative companies include GE Healthcare, Philips, Mindray, Edan, and Huntleigh. Global total production capacity is approximately 2.2-2.6 million units per year, with an overall gross profit margin of approximately 22%-38%. Downstream consumption is driven by the number of pregnant women, the frequency of prenatal checkups, and the intervention rate for high-risk pregnancies; among upstream materials, piezoelectric chips account for approximately 7%-12% of the total cost, while signal processing and display modules account for approximately 25%-40%. Future solutions include portability, wireless probes, remote labor monitoring, AI-based fetal

heart rate variability analysis, and integration with electronic medical record platforms to improve the efficiency of digital management in obstetrics.

As a mature field of medical equipment, fetal ultrasound monitoring is undergoing a profound transformation from basic 'monitoring' functions to a 'smart, comprehensive, and personalized' management model. The core driving force of the market is no longer merely routine equipment procurement by medical institutions, but rather stems from the global pursuit of reducing perinatal mortality and improving neonatal outcomes. This has prompted clinical practice to demand higher and more precise fetal safety assessments. Therefore, while basic models maintain stable demand in the primary care market, technologically advanced high-end products and comprehensive solutions are becoming the main engines of market growth and profit focus.

Technological integration and the reshaping of data value are the most significant trends in the current market. Simple fetal heart rate curve recording can no longer meet the complex needs of high-risk pregnancy management. Equipment integrating advanced functions such as umbilical artery/middle cerebral artery Doppler blood flow monitoring and fetal electrocardiogram ST segment analysis is becoming the technological high ground for large tertiary hospitals and obstetrics and gynecology centers. These devices can provide deeper fetal physiological information, providing crucial evidence for clinicians' intervention decisions at critical moments (such as fetal growth restriction or intrapartum hypoxia). Meanwhile, artificial intelligence is redefining how monitoring data is interpreted. Embedded AI algorithms can automatically analyze fetal heart rate baselines, variability, and deceleration types, significantly improving the efficiency and consistency of interpretation, reducing operator dependence, and laying the foundation for remote expert consultations and the establishment of regional perinatal monitoring networks through cloud data platforms. This is particularly helpful in improving the quality of obstetric services in areas with underdeveloped medical resources.

In terms of market structure and competition, a distinct stratification is evident. In primary and emerging markets, cost-effective and easy-to-use handheld fetal heart rate monitors and basic desktop monitors remain the mainstream, leading to fierce competition. However, in the high-end market, competition has moved beyond hardware itself to integrated solutions centered around a central station system. Suppliers capable of providing complete solutions—from bedside monitoring to central station display, data management, and seamless integration with hospital HIS/LIS systems—are leveraging their ecosystem lock-in effect to build strong customer loyalty and competitive barriers. Furthermore, a promising new niche market—home fetal heart rate monitoring rental

services?is emerging. By leasing medical-grade monitors and providing remote cloud platform interpretation, it meets the continuous monitoring needs of families with high-risk pregnant women, representing a typical example of extending medical services from hospitals to homes and opening up a new business model.

In conclusion, the market prospects for ultrasound fetal monitors are broad, but challenges remain. Future growth will heavily depend on the enhanced clinical value brought about by technological innovation. The winners will be those companies that deeply understand the clinical pain points of perinatal medicine and provide comprehensive, personalized fetal health management solutions throughout the entire lifecycle, from in-hospital to out-of-hospital, and from general to high-risk cases, by integrating AI, big data, and advanced sensing technologies. The core of market competition is evolving from a single product performance and price to a comprehensive contest of technological ecosystem, data value, and clinical services.

This report is a detailed and comprehensive analysis for global Ultrasonic Fetal Monitor 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 Ultrasonic Fetal Monitor market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Ultrasonic Fetal Monitor market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Ultrasonic Fetal Monitor market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Ultrasonic Fetal Monitor market shares of main players, shipments in revenue (\$ Million), sales quantity (K 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 Ultrasonic Fetal Monitor

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 Ultrasonic Fetal Monitor 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 SonoStar, Philips, EDANUSA, Meditech Group, GE HealthCare, Lian-med, Medzer, Kalstein, TOITU, McCanMedical, etc.

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

Market Segmentation

Ultrasonic Fetal Monitor 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 segment by Type

Handheld

Desktop

Market segment by Technology

Continuous Wave Doppler

Pulse Wave Doppler

Market segment by Monitoring Mode

Wired Type

Wireless Type

Market segment by Application

Prenatal Monitoring

Postnatal Monitoring

Monitoring During Delivery

Others

Major players covered

SonoStar

Philips

EDANUSA

Meditech Group

GE HealthCare

Lian-med

Medzer

Kalstein

TOITU

MeCanMedical

Dinyimedical

Heal Force

LUCKCOME

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Ultrasonic Fetal Monitor product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Ultrasonic Fetal Monitor, with price, sales quantity, revenue, and global market share of Ultrasonic Fetal Monitor from 2021 to 2026.

Chapter 3, the Ultrasonic Fetal Monitor competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Ultrasonic Fetal Monitor 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 Ultrasonic Fetal Monitor 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 Ultrasonic Fetal Monitor.

Chapter 14 and 15, to describe Ultrasonic Fetal Monitor sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Botanical Beverages Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Ready-to-Drink Beverages

1.3.3 Concentrates

1.3.4 Infusions

1.3.5 Others

1.4 Market Analysis by Application

1.4.1 Overview: Global Botanical Beverages Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.4.2 Online Sales

1.4.3 Offline Sales

1.5 Global Botanical Beverages Market Size & Forecast

1.5.1 Global Botanical Beverages Consumption Value (2021 & 2025 & 2032)

1.5.2 Global Botanical Beverages Sales Quantity (2021-2032)

1.5.3 Global Botanical Beverages Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Britvic Plc

2.1.1 Britvic Plc Details

2.1.2 Britvic Plc Major Business

2.1.3 Britvic Plc Botanical Beverages Product and Services

2.1.4 Britvic Plc Botanical Beverages Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Britvic Plc Recent Developments/Updates

2.2 Fever Tree

2.2.1 Fever Tree Details

2.2.2 Fever Tree Major Business

2.2.3 Fever Tree Botanical Beverages Product and Services

2.2.4 Fever Tree Botanical Beverages Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Fever Tree Recent Developments/Updates

2.3 Bumblezest

2.3.1 Bumblezest Details

2.3.2 Bumblezest Major Business

2.3.3 Bumblezest Botanical Beverages Product and Services

2.3.4 Bumblezest Botanical Beverages Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Bumblezest Recent Developments/Updates

2.4 Blue Sky Botanics Ltd.

2.4.1 Blue Sky Botanics Ltd. Details

2.4.2 Blue Sky Botanics Ltd. Major Business

2.4.3 Blue Sky Botanics Ltd. Botanical Beverages Product and Services

2.4.4 Blue Sky Botanics Ltd. Botanical Beverages Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Blue Sky Botanics Ltd. Recent Developments/Updates

2.5 Suja Life, LLC

2.5.1 Suja Life, LLC Details

2.5.2 Suja Life, LLC Major Business

2.5.3 Suja Life, LLC Botanical Beverages Product and Services

2.5.4 Suja Life, LLC Botanical Beverages Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Suja Life, LLC Recent Developments/Updates

2.6 Cotswolds Distillery

2.6.1 Cotswolds Distillery Details

2.6.2 Cotswolds Distillery Major Business

2.6.3 Cotswolds Distillery Botanical Beverages Product and Services

2.6.4 Cotswolds Distillery Botanical Beverages Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Cotswolds Distillery Recent Developments/Updates

2.7 Archer Daniels Midland Company

2.7.1 Archer Daniels Midland Company Details

2.7.2 Archer Daniels Midland Company Major Business

2.7.3 Archer Daniels Midland Company Botanical Beverages Product and Services

2.7.4 Archer Daniels Midland Company Botanical Beverages Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.7.5 Archer Daniels Midland Company Recent Developments/Updates

2.8 Nestl? S.A.

2.8.1 Nestl? S.A. Details

2.8.2 Nestl? S.A. Major Business

2.8.3 Nestl? S.A. Botanical Beverages Product and Services

2.8.4 Nestl? S.A. Botanical Beverages Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.8.5 Nestl? S.A. Recent Developments/Updates

2.9 Danone S.A.

2.9.1 Danone S.A. Details

2.9.2 Danone S.A. Major Business

2.9.3 Danone S.A. Botanical Beverages Product and Services

2.9.4 Danone S.A. Botanical Beverages Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 Danone S.A. Recent Developments/Updates

2.10 Martin Bauer Group

2.10.1 Martin Bauer Group Details

2.10.2 Martin Bauer Group Major Business

2.10.3 Martin Bauer Group Botanical Beverages Product and Services

2.10.4 Martin Bauer Group Botanical Beverages Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.10.5 Martin Bauer Group Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: BOTANICAL BEVERAGES BY MANUFACTURER

3.1 Global Botanical Beverages Sales Quantity by Manufacturer (2021-2026)

3.2 Global Botanical Beverages Revenue by Manufacturer (2021-2026)

3.3 Global Botanical Beverages Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Botanical Beverages by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Botanical Beverages Manufacturer Market Share in 2025

3.4.3 Top 6 Botanical Beverages Manufacturer Market Share in 2025

3.5 Botanical Beverages Market: Overall Company Footprint Analysis

3.5.1 Botanical Beverages Market: Region Footprint

3.5.2 Botanical Beverages Market: Company Product Type Footprint

3.5.3 Botanical Beverages Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Botanical Beverages Market Size by Region

4.1.1 Global Botanical Beverages Sales Quantity by Region (2021-2032)

- 4.1.2 Global Botanical Beverages Consumption Value by Region (2021-2032)
- 4.1.3 Global Botanical Beverages Average Price by Region (2021-2032)
- 4.2 North America Botanical Beverages Consumption Value (2021-2032)
- 4.3 Europe Botanical Beverages Consumption Value (2021-2032)
- 4.4 Asia-Pacific Botanical Beverages Consumption Value (2021-2032)
- 4.5 South America Botanical Beverages Consumption Value (2021-2032)
- 4.6 Middle East & Africa Botanical Beverages Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

- 5.1 Global Botanical Beverages Sales Quantity by Type (2021-2032)
- 5.2 Global Botanical Beverages Consumption Value by Type (2021-2032)
- 5.3 Global Botanical Beverages Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

- 6.1 Global Botanical Beverages Sales Quantity by Application (2021-2032)
- 6.2 Global Botanical Beverages Consumption Value by Application (2021-2032)
- 6.3 Global Botanical Beverages Average Price by Application (2021-2032)

7 NORTH AMERICA

- 7.1 North America Botanical Beverages Sales Quantity by Type (2021-2032)
- 7.2 North America Botanical Beverages Sales Quantity by Application (2021-2032)
- 7.3 North America Botanical Beverages Market Size by Country
 - 7.3.1 North America Botanical Beverages Sales Quantity by Country (2021-2032)
 - 7.3.2 North America Botanical Beverages Consumption Value by Country (2021-2032)
 - 7.3.3 United States Market Size and Forecast (2021-2032)
 - 7.3.4 Canada Market Size and Forecast (2021-2032)
 - 7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

- 8.1 Europe Botanical Beverages Sales Quantity by Type (2021-2032)
- 8.2 Europe Botanical Beverages Sales Quantity by Application (2021-2032)
- 8.3 Europe Botanical Beverages Market Size by Country
 - 8.3.1 Europe Botanical Beverages Sales Quantity by Country (2021-2032)
 - 8.3.2 Europe Botanical Beverages Consumption Value by Country (2021-2032)
 - 8.3.3 Germany Market Size and Forecast (2021-2032)

- 8.3.4 France Market Size and Forecast (2021-2032)
- 8.3.5 United Kingdom Market Size and Forecast (2021-2032)
- 8.3.6 Russia Market Size and Forecast (2021-2032)
- 8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

- 9.1 Asia-Pacific Botanical Beverages Sales Quantity by Type (2021-2032)
- 9.2 Asia-Pacific Botanical Beverages Sales Quantity by Application (2021-2032)
- 9.3 Asia-Pacific Botanical Beverages Market Size by Region
 - 9.3.1 Asia-Pacific Botanical Beverages Sales Quantity by Region (2021-2032)
 - 9.3.2 Asia-Pacific Botanical Beverages Consumption Value by Region (2021-2032)
 - 9.3.3 China Market Size and Forecast (2021-2032)
 - 9.3.4 Japan Market Size and Forecast (2021-2032)
 - 9.3.5 South Korea Market Size and Forecast (2021-2032)
 - 9.3.6 India Market Size and Forecast (2021-2032)
 - 9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
 - 9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

- 10.1 South America Botanical Beverages Sales Quantity by Type (2021-2032)
- 10.2 South America Botanical Beverages Sales Quantity by Application (2021-2032)
- 10.3 South America Botanical Beverages Market Size by Country
 - 10.3.1 South America Botanical Beverages Sales Quantity by Country (2021-2032)
 - 10.3.2 South America Botanical Beverages Consumption Value by Country (2021-2032)
 - 10.3.3 Brazil Market Size and Forecast (2021-2032)
 - 10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

- 11.1 Middle East & Africa Botanical Beverages Sales Quantity by Type (2021-2032)
- 11.2 Middle East & Africa Botanical Beverages Sales Quantity by Application (2021-2032)
- 11.3 Middle East & Africa Botanical Beverages Market Size by Country
 - 11.3.1 Middle East & Africa Botanical Beverages Sales Quantity by Country (2021-2032)
 - 11.3.2 Middle East & Africa Botanical Beverages Consumption Value by Country

(2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Botanical Beverages Market Drivers

12.2 Botanical Beverages Market Restraints

12.3 Botanical Beverages Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Botanical Beverages and Key Manufacturers

13.2 Manufacturing Costs Percentage of Botanical Beverages

13.3 Botanical Beverages Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Botanical Beverages Typical Distributors

14.3 Botanical Beverages Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Ultrasonic Fetal Monitor Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Ultrasonic Fetal Monitor Consumption Value by Technology, (USD Million), 2021 & 2025 & 2032

Table 3. Global Ultrasonic Fetal Monitor Consumption Value by Monitoring Mode, (USD Million), 2021 & 2025 & 2032

Table 4. Global Ultrasonic Fetal Monitor Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. SonoStar Basic Information, Manufacturing Base and Competitors

Table 6. SonoStar Major Business

Table 7. SonoStar Ultrasonic Fetal Monitor Product and Services

Table 8. SonoStar Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. SonoStar Recent Developments/Updates

Table 10. Philips Basic Information, Manufacturing Base and Competitors

Table 11. Philips Major Business

Table 12. Philips Ultrasonic Fetal Monitor Product and Services

Table 13. Philips Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. Philips Recent Developments/Updates

Table 15. EDANUSA Basic Information, Manufacturing Base and Competitors

Table 16. EDANUSA Major Business

Table 17. EDANUSA Ultrasonic Fetal Monitor Product and Services

Table 18. EDANUSA Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. EDANUSA Recent Developments/Updates

Table 20. Meditech Group Basic Information, Manufacturing Base and Competitors

Table 21. Meditech Group Major Business

Table 22. Meditech Group Ultrasonic Fetal Monitor Product and Services

Table 23. Meditech Group Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. Meditech Group Recent Developments/Updates

Table 25. GE HealthCare Basic Information, Manufacturing Base and Competitors

Table 26. GE HealthCare Major Business

Table 27. GE HealthCare Ultrasonic Fetal Monitor Product and Services

Table 28. GE HealthCare Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. GE HealthCare Recent Developments/Updates

Table 30. Lian-med Basic Information, Manufacturing Base and Competitors

Table 31. Lian-med Major Business

Table 32. Lian-med Ultrasonic Fetal Monitor Product and Services

Table 33. Lian-med Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Lian-med Recent Developments/Updates

Table 35. Medzer Basic Information, Manufacturing Base and Competitors

Table 36. Medzer Major Business

Table 37. Medzer Ultrasonic Fetal Monitor Product and Services

Table 38. Medzer Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. Medzer Recent Developments/Updates

Table 40. Kalstein Basic Information, Manufacturing Base and Competitors

Table 41. Kalstein Major Business

Table 42. Kalstein Ultrasonic Fetal Monitor Product and Services

Table 43. Kalstein Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Kalstein Recent Developments/Updates

Table 45. TOITU Basic Information, Manufacturing Base and Competitors

Table 46. TOITU Major Business

Table 47. TOITU Ultrasonic Fetal Monitor Product and Services

Table 48. TOITU Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. TOITU Recent Developments/Updates

Table 50. McCanMedical Basic Information, Manufacturing Base and Competitors

Table 51. McCanMedical Major Business

Table 52. McCanMedical Ultrasonic Fetal Monitor Product and Services

Table 53. McCanMedical Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 54. McCanMedical Recent Developments/Updates

Table 55. Dinyimedical Basic Information, Manufacturing Base and Competitors

Table 56. Dinyimedical Major Business

Table 57. Dinyimedical Ultrasonic Fetal Monitor Product and Services

Table 58. Dinyimedical Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 59. Dinyimedical Recent Developments/Updates

Table 60. Heal Force Basic Information, Manufacturing Base and Competitors
Table 61. Heal Force Major Business
Table 62. Heal Force Ultrasonic Fetal Monitor Product and Services
Table 63. Heal Force Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 64. Heal Force Recent Developments/Updates
Table 65. LUCKCOME Basic Information, Manufacturing Base and Competitors
Table 66. LUCKCOME Major Business
Table 67. LUCKCOME Ultrasonic Fetal Monitor Product and Services
Table 68. LUCKCOME Ultrasonic Fetal Monitor Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 69. LUCKCOME Recent Developments/Updates
Table 70. Global Ultrasonic Fetal Monitor Sales Quantity by Manufacturer (2021-2026) & (K Units)
Table 71. Global Ultrasonic Fetal Monitor Revenue by Manufacturer (2021-2026) & (USD Million)
Table 72. Global Ultrasonic Fetal Monitor Average Price by Manufacturer (2021-2026) & (US\$/Unit)
Table 73. Market Position of Manufacturers in Ultrasonic Fetal Monitor, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
Table 74. Head Office and Ultrasonic Fetal Monitor Production Site of Key Manufacturer
Table 75. Ultrasonic Fetal Monitor Market: Company Product Type Footprint
Table 76. Ultrasonic Fetal Monitor Market: Company Product Application Footprint
Table 77. Ultrasonic Fetal Monitor New Market Entrants and Barriers to Market Entry
Table 78. Ultrasonic Fetal Monitor Mergers, Acquisition, Agreements, and Collaborations
Table 79. Global Ultrasonic Fetal Monitor Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
Table 80. Global Ultrasonic Fetal Monitor Sales Quantity by Region (2021-2026) & (K Units)
Table 81. Global Ultrasonic Fetal Monitor Sales Quantity by Region (2027-2032) & (K Units)
Table 82. Global Ultrasonic Fetal Monitor Consumption Value by Region (2021-2026) & (USD Million)
Table 83. Global Ultrasonic Fetal Monitor Consumption Value by Region (2027-2032) & (USD Million)
Table 84. Global Ultrasonic Fetal Monitor Average Price by Region (2021-2026) & (US\$/Unit)
Table 85. Global Ultrasonic Fetal Monitor Average Price by Region (2027-2032) &

(US\$/Unit)

Table 86. Global Ultrasonic Fetal Monitor Sales Quantity by Type (2021-2026) & (K Units)

Table 87. Global Ultrasonic Fetal Monitor Sales Quantity by Type (2027-2032) & (K Units)

Table 88. Global Ultrasonic Fetal Monitor Consumption Value by Type (2021-2026) & (USD Million)

Table 89. Global Ultrasonic Fetal Monitor Consumption Value by Type (2027-2032) & (USD Million)

Table 90. Global Ultrasonic Fetal Monitor Average Price by Type (2021-2026) & (US\$/Unit)

Table 91. Global Ultrasonic Fetal Monitor Average Price by Type (2027-2032) & (US\$/Unit)

Table 92. Global Ultrasonic Fetal Monitor Sales Quantity by Application (2021-2026) & (K Units)

Table 93. Global Ultrasonic Fetal Monitor Sales Quantity by Application (2027-2032) & (K Units)

Table 94. Global Ultrasonic Fetal Monitor Consumption Value by Application (2021-2026) & (USD Million)

Table 95. Global Ultrasonic Fetal Monitor Consumption Value by Application (2027-2032) & (USD Million)

Table 96. Global Ultrasonic Fetal Monitor Average Price by Application (2021-2026) & (US\$/Unit)

Table 97. Global Ultrasonic Fetal Monitor Average Price by Application (2027-2032) & (US\$/Unit)

Table 98. North America Ultrasonic Fetal Monitor Sales Quantity by Type (2021-2026) & (K Units)

Table 99. North America Ultrasonic Fetal Monitor Sales Quantity by Type (2027-2032) & (K Units)

Table 100. North America Ultrasonic Fetal Monitor Sales Quantity by Application (2021-2026) & (K Units)

Table 101. North America Ultrasonic Fetal Monitor Sales Quantity by Application (2027-2032) & (K Units)

Table 102. North America Ultrasonic Fetal Monitor Sales Quantity by Country (2021-2026) & (K Units)

Table 103. North America Ultrasonic Fetal Monitor Sales Quantity by Country (2027-2032) & (K Units)

Table 104. North America Ultrasonic Fetal Monitor Consumption Value by Country (2021-2026) & (USD Million)

Table 105. North America Ultrasonic Fetal Monitor Consumption Value by Country (2027-2032) & (USD Million)

Table 106. Europe Ultrasonic Fetal Monitor Sales Quantity by Type (2021-2026) & (K Units)

Table 107. Europe Ultrasonic Fetal Monitor Sales Quantity by Type (2027-2032) & (K Units)

Table 108. Europe Ultrasonic Fetal Monitor Sales Quantity by Application (2021-2026) & (K Units)

Table 109. Europe Ultrasonic Fetal Monitor Sales Quantity by Application (2027-2032) & (K Units)

Table 110. Europe Ultrasonic Fetal Monitor Sales Quantity by Country (2021-2026) & (K Units)

Table 111. Europe Ultrasonic Fetal Monitor Sales Quantity by Country (2027-2032) & (K Units)

Table 112. Europe Ultrasonic Fetal Monitor Consumption Value by Country (2021-2026) & (USD Million)

Table 113. Europe Ultrasonic Fetal Monitor Consumption Value by Country (2027-2032) & (USD Million)

Table 114. Asia-Pacific Ultrasonic Fetal Monitor Sales Quantity by Type (2021-2026) & (K Units)

Table 115. Asia-Pacific Ultrasonic Fetal Monitor Sales Quantity by Type (2027-2032) & (K Units)

Table 116. Asia-Pacific Ultrasonic Fetal Monitor Sales Quantity by Application (2021-2026) & (K Units)

Table 117. Asia-Pacific Ultrasonic Fetal Monitor Sales Quantity by Application (2027-2032) & (K Units)

Table 118. Asia-Pacific Ultrasonic Fetal Monitor Sales Quantity by Region (2021-2026) & (K Units)

Table 119. Asia-Pacific Ultrasonic Fetal Monitor Sales Quantity by Region (2027-2032) & (K Units)

Table 120. Asia-Pacific Ultrasonic Fetal Monitor Consumption Value by Region (2021-2026) & (USD Million)

Table 121. Asia-Pacific Ultrasonic Fetal Monitor Consumption Value by Region (2027-2032) & (USD Million)

Table 122. South America Ultrasonic Fetal Monitor Sales Quantity by Type (2021-2026) & (K Units)

Table 123. South America Ultrasonic Fetal Monitor Sales Quantity by Type (2027-2032) & (K Units)

Table 124. South America Ultrasonic Fetal Monitor Sales Quantity by Application

(2021-2026) & (K Units)

Table 125. South America Ultrasonic Fetal Monitor Sales Quantity by Application
(2027-2032) & (K Units)

Table 126. South America Ultrasonic Fetal Monitor Sales Quantity by Country
(2021-2026) & (K Units)

Table 127. South America Ultrasonic Fetal Monitor Sales Quantity by Country
(2027-2032) & (K Units)

Table 128. South America Ultrasonic Fetal Monitor Consumption Value by Country
(2021-2026) & (USD Million)

Table 129. South America Ultrasonic Fetal Monitor Consumption Value by Country
(2027-2032) & (USD Million)

Table 130. Middle East & Africa Ultrasonic Fetal Monitor Sales Quantity by Type
(2021-2026) & (K Units)

Table 131. Middle East & Africa Ultrasonic Fetal Monitor Sales Quantity by Type
(2027-2032) & (K Units)

Table 132. Middle East & Africa Ultrasonic Fetal Monitor Sales Quantity by Application
(2021-2026) & (K Units)

Table 133. Middle East & Africa Ultrasonic Fetal Monitor Sales Quantity by Application
(2027-2032) & (K Units)

Table 134. Middle East & Africa Ultrasonic Fetal Monitor Sales Quantity by Country
(2021-2026) & (K Units)

Table 135. Middle East & Africa Ultrasonic Fetal Monitor Sales Quantity by Country
(2027-2032) & (K Units)

Table 136. Middle East & Africa Ultrasonic Fetal Monitor Consumption Value by Country
(2021-2026) & (USD Million)

Table 137. Middle East & Africa Ultrasonic Fetal Monitor Consumption Value by Country
(2027-2032) & (USD Million)

Table 138. Ultrasonic Fetal Monitor Raw Material

Table 139. Key Manufacturers of Ultrasonic Fetal Monitor Raw Materials

Table 140. Ultrasonic Fetal Monitor Typical Distributors

Table 141. Ultrasonic Fetal Monitor Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Ultrasonic Fetal Monitor Picture
- Figure 2. Global Ultrasonic Fetal Monitor Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Ultrasonic Fetal Monitor Revenue Market Share by Type in 2025
- Figure 4. Handheld Examples
- Figure 5. Desktop Examples
- Figure 6. Global Ultrasonic Fetal Monitor Revenue by Technology, (USD Million), 2021 & 2025 & 2032
- Figure 7. Global Ultrasonic Fetal Monitor Revenue Market Share by Technology in 2025
- Figure 8. Continuous Wave Doppler Examples
- Figure 9. Pulse Wave Doppler Examples
- Figure 10. Global Ultrasonic Fetal Monitor Revenue by Monitoring Mode, (USD Million), 2021 & 2025 & 2032
- Figure 11. Global Ultrasonic Fetal Monitor Revenue Market Share by Monitoring Mode in 2025
- Figure 12. Wired Type Examples
- Figure 13. Wireless Type Examples
- Figure 14. Global Ultrasonic Fetal Monitor Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 15. Global Ultrasonic Fetal Monitor Revenue Market Share by Application in 2025
- Figure 16. Prenatal Monitoring Examples
- Figure 17. Postnatal Monitoring Examples
- Figure 18. Monitoring During Delivery Examples
- Figure 19. Others Examples
- Figure 20. Global Ultrasonic Fetal Monitor Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 21. Global Ultrasonic Fetal Monitor Consumption Value and Forecast (2021-2032) & (USD Million)
- Figure 22. Global Ultrasonic Fetal Monitor Sales Quantity (2021-2032) & (K Units)
- Figure 23. Global Ultrasonic Fetal Monitor Price (2021-2032) & (US\$/Unit)
- Figure 24. Global Ultrasonic Fetal Monitor Sales Quantity Market Share by Manufacturer in 2025
- Figure 25. Global Ultrasonic Fetal Monitor Revenue Market Share by Manufacturer in 2025

Figure 26. Producer Shipments of Ultrasonic Fetal Monitor by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 27. Top 3 Ultrasonic Fetal Monitor Manufacturer (Revenue) Market Share in 2025

Figure 28. Top 6 Ultrasonic Fetal Monitor Manufacturer (Revenue) Market Share in 2025

Figure 29. Global Ultrasonic Fetal Monitor Sales Quantity Market Share by Region (2021-2032)

Figure 30. Global Ultrasonic Fetal Monitor Consumption Value Market Share by Region (2021-2032)

Figure 31. North America Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 32. Europe Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 33. Asia-Pacific Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 34. South America Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 35. Middle East & Africa Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 36. Global Ultrasonic Fetal Monitor Sales Quantity Market Share by Type (2021-2032)

Figure 37. Global Ultrasonic Fetal Monitor Consumption Value Market Share by Type (2021-2032)

Figure 38. Global Ultrasonic Fetal Monitor Average Price by Type (2021-2032) & (US\$/Unit)

Figure 39. Global Ultrasonic Fetal Monitor Sales Quantity Market Share by Application (2021-2032)

Figure 40. Global Ultrasonic Fetal Monitor Revenue Market Share by Application (2021-2032)

Figure 41. Global Ultrasonic Fetal Monitor Average Price by Application (2021-2032) & (US\$/Unit)

Figure 42. North America Ultrasonic Fetal Monitor Sales Quantity Market Share by Type (2021-2032)

Figure 43. North America Ultrasonic Fetal Monitor Sales Quantity Market Share by Application (2021-2032)

Figure 44. North America Ultrasonic Fetal Monitor Sales Quantity Market Share by Country (2021-2032)

Figure 45. North America Ultrasonic Fetal Monitor Consumption Value Market Share by

Country (2021-2032)

Figure 46. United States Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 47. Canada Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 48. Mexico Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 49. Europe Ultrasonic Fetal Monitor Sales Quantity Market Share by Type (2021-2032)

Figure 50. Europe Ultrasonic Fetal Monitor Sales Quantity Market Share by Application (2021-2032)

Figure 51. Europe Ultrasonic Fetal Monitor Sales Quantity Market Share by Country (2021-2032)

Figure 52. Europe Ultrasonic Fetal Monitor Consumption Value Market Share by Country (2021-2032)

Figure 53. Germany Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 54. France Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 55. United Kingdom Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 56. Russia Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 57. Italy Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 58. Asia-Pacific Ultrasonic Fetal Monitor Sales Quantity Market Share by Type (2021-2032)

Figure 59. Asia-Pacific Ultrasonic Fetal Monitor Sales Quantity Market Share by Application (2021-2032)

Figure 60. Asia-Pacific Ultrasonic Fetal Monitor Sales Quantity Market Share by Region (2021-2032)

Figure 61. Asia-Pacific Ultrasonic Fetal Monitor Consumption Value Market Share by Region (2021-2032)

Figure 62. China Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 63. Japan Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 64. South Korea Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 65. India Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 66. Southeast Asia Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 67. Australia Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 68. South America Ultrasonic Fetal Monitor Sales Quantity Market Share by Type (2021-2032)

Figure 69. South America Ultrasonic Fetal Monitor Sales Quantity Market Share by Application (2021-2032)

Figure 70. South America Ultrasonic Fetal Monitor Sales Quantity Market Share by Country (2021-2032)

Figure 71. South America Ultrasonic Fetal Monitor Consumption Value Market Share by Country (2021-2032)

Figure 72. Brazil Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 73. Argentina Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 74. Middle East & Africa Ultrasonic Fetal Monitor Sales Quantity Market Share by Type (2021-2032)

Figure 75. Middle East & Africa Ultrasonic Fetal Monitor Sales Quantity Market Share by Application (2021-2032)

Figure 76. Middle East & Africa Ultrasonic Fetal Monitor Sales Quantity Market Share by Country (2021-2032)

Figure 77. Middle East & Africa Ultrasonic Fetal Monitor Consumption Value Market Share by Country (2021-2032)

Figure 78. Turkey Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 79. Egypt Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 80. Saudi Arabia Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 81. South Africa Ultrasonic Fetal Monitor Consumption Value (2021-2032) & (USD Million)

Figure 82. Ultrasonic Fetal Monitor Market Drivers

Figure 83. Ultrasonic Fetal Monitor Market Restraints

Figure 84. Ultrasonic Fetal Monitor Market Trends

Figure 85. Porters Five Forces Analysis

Figure 86. Manufacturing Cost Structure Analysis of Ultrasonic Fetal Monitor in 2025

Figure 87. Manufacturing Process Analysis of Ultrasonic Fetal Monitor

Figure 88. Ultrasonic Fetal Monitor Industrial Chain

Figure 89. Sales Channel: Direct to End-User vs Distributors

Figure 90. Direct Channel Pros & Cons

Figure 91. Indirect Channel Pros & Cons

Figure 92. Methodology

Figure 93. Research Process and Data Source

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