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Global Urology Ultrasound Machine Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Urology Ultrasound Machine market size is expected to reach $ 873 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

A urology ultrasound machine is an ultrasound imaging device configured for the examination, measurement, and image-guided treatment of the urinary and male reproductive systems. Urology ultrasound machines focus on a dedicated urology ultrasound platform, portable and handheld devices with proven urological applications, non-invasive bladder capacity scanners, and ultrasound systems for prostate imaging or biopsy guidance. These products assess the kidneys, bladder, prostate, and related anatomical structures using transabdominal, intracavitary, transrectal, transperineal, or dedicated bladder scanning probes. Core functions include B-mode and Doppler imaging, post-void residual urine measurement, bladder and prostate volume calculation, urinary tract examination, stone or obstruction assessment, biopsy guidance, and fusion image navigation.

Key Findings

Demand for residual urine measurement in the bladder remains stable.

Magnetic resonance imaging (MRI) and ultrasound fusion drive prostate biopsy.

Artificial intelligence accelerates bladder and prostate measurement.

Portable devices expand urological imaging coverage in primary care.

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Mature markets grow through process upgrades.

Industry Trends

The urological ultrasound market is evolving from traditional equipment primarily focused on anatomical imaging to dedicated platforms integrating automated measurement, interventional navigation, and networked workflows. In bladder assessment, artificial intelligence and deep learning algorithms are increasingly being used for anatomical segmentation, volume calculation, and reducing manual measurement steps. Recent regulatory approvals indicate that automated bladder and prostate volume measurement is expanding from high-end trolley devices to portable and app-driven ultrasound environments. Prostate diagnostic techniques are evolving from traditional transrectal imaging to perineal guidance, MRI-ultrasound fusion, micro-ultrasound-assisted biopsy assessment, and data recording for active monitoring and focal treatment planning. The 2026 European Prostate Cancer Guidelines added indications for micro-ultrasound biopsy, demonstrating that ultrasound maintains its important technological position while MRI is deeply involved in the diagnostic pathway. Product design is also placing greater emphasis on miniaturization, rapid probe sterilization, electronic medical record connectivity, simplified user interfaces, and automated quality assistance. The long-term market will develop into a tiered product system covering routine bladder measurements, diagnostic imaging, and high-value interventional guidance.

Market Dynamics

Driven Factors

The fundamental market drivers are an aging population, the widespread presence of lower urinary tract symptoms, and the continued demand for non-invasive assessment of bladder, kidney, and prostate diseases. The aging population expands the potential patient base for benign prostatic hyperplasia, urinary retention, neurogenic bladder, and multiple coexisting chronic diseases. Healthcare systems are also increasingly prioritizing reusable diagnostic methods that do not generate ionizing radiation. Clinical guidelines recommend measuring post-void residual urine in the assessment of lower urinary tract symptoms in men; bladder ultrasound or dedicated bladder scanners can replace catheterization. Prostate diseases constitute a second stable demand base, with ultrasound used for volume assessment, biopsy guidance, and fusion localization

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throughout diagnosis and follow-up. Hospitals also utilize urological ultrasound to assess urinary retention and assist in catheterization decisions in emergency, postoperative, rehabilitation, and long-term care processes. These applications extend demand to urology specialties and general wards, while portable and automated systems expand the pool of healthcare personnel capable of performing standardized examinations at the patient's bedside.

Limitations: The market is limited by operator dependence, differences in clinical procedures, and functional overlap between specialized equipment and general-purpose ultrasound platforms. Patient anatomy, bladder morphology, ascites, diverticula, obesity, probe placement, and operator experience can all affect measurement results. Clinical guidelines also state that post-void residual urine values ??alone cannot directly determine the cause of voiding dysfunction. Automated algorithms can reduce manual steps but remain an auxiliary tool; healthcare professionals bear ultimate responsibility for image quality and measurement validity. High-end prostate imaging and fusion biopsy platforms require specialized probes, software, positioning components, personnel training, and operating room integration, resulting in higher procurement and maintenance costs. Institutions with insufficient examination volume may continue to use general-purpose diagnostic ultrasound without implementing dedicated urology systems. Payment constraints, capital budgets, and long equipment replacement cycles also slow adoption in small and medium-sized institutions and resource-constrained markets. Infection control for endocavitary and transrectal probes adds costs associated with protective sheaths, sterilization, storage, and record management.

Market Opportunities: The most attractive opportunities lie in portable automation, prostate interventional guidance, and continuous or repetitive bladder monitoring. Artificial intelligence-assisted bladder and prostate measurements can shorten examination time, improve consistency, and expand the use by non-specialist ultrasound operators while maintaining clinical review. Handheld scanners connected to mobile devices are suitable for resource-constrained scenarios such as outpatient clinics, rehabilitation, home-based care, and where traditional cart-based equipment is difficult to deploy. Wearable ultrasound for periodic non-invasive bladder capacity monitoring is an emerging technology that can serve specific patients requiring repeated assessments and reduce intermittent manual scanning. MRI-ultrasound fusion, transperineal biopsy, and micro-ultrasound workflows in prostate diagnosis and treatment offer greater value because customers are purchasing not only image quality but also navigation, planning, recording, and operational standardization. Automated reporting, electronic medical record transmission, remote ultrasound support, and

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service models based on software upgrades or analytics also have growth potential. Suppliers capable of offering scalable product portfolios ranging from routine bladder measurements to advanced urological interventions are better positioned to enter standardized multi-departmental procurement systems in hospitals.

Industry Risks and Challenges The core challenge in the industry is ensuring reliable equipment performance across diverse patient anatomy and clinical settings while simplifying operations. Bladder scanners need to differentiate the bladder from surrounding fluid-filled structures and cover capacity measurements in adults, children, post-operative patients, and patients with complex anatomy. Prostate devices need to balance high-frequency image detail, sufficient field of view, probe ergonomics, and needle tip visibility during transrectal or transperineal procedures. Artificial intelligence functionality requires representative validation datasets, clearly defined performance boundaries, and allows clinicians to review or adjust automated results. As devices integrate with hospital networks and electronic medical records, cybersecurity, software maintenance, and data interface obligations continue to increase.

Supply Chain Analysis: The upstream of the supply chain mainly includes piezoelectric and semiconductor transducer materials, acoustic lenses, probe cables, medical-grade housings, ultrasound front-end circuits, beamformers, processors, displays, batteries, trolleys, position sensors, and biopsy guidance components. Urology-specific devices also require transrectal, transperineal, dual-plane, end-fire, abdominal, and bladder scanning probes designed according to specific frequencies, fields of view, and surgical procedures. Artificial intelligence products rely on software development tools, labeled clinical data, image processing algorithms, and secure data infrastructure. Infection control consumables, probe sleeves, biopsy needle guides, and sterilization-resistant materials constitute important repurchase links. Component value depends on acoustic performance, miniaturization, durability, electrical safety, biocompatibility, and resistance to repeated cleaning. Portable and handheld products prioritize battery life, wireless connectivity, and compact probe integration, while interventional systems require precise positioning and stable mechanical alignment.

Midstream value creation encompasses acoustic design, hardware integration, image reconstruction, urological pre-programming development, automated measurement, clinical validation, regulatory registration, and application process engineering. Dedicated bladder scanners deliver value through rapid volume calculation and simplified operation, while high-end urological platforms add value through dedicated probes, MRI-ultrasound fusion, elastography, biopsy navigation, and continuous recording. Downstream customers include hospital urology departments, imaging

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centers, day clinics, emergency departments, rehabilitation facilities, nursing homes, and medical device distributors. Revenue streams include equipment, probes, accessories, software licensing, maintenance, extended warranties, training, and replacement consumables. Companies with proprietary probe technology, regulatory approvals, and the ability to generate repeat purchases through services, probes, or software typically have stronger profitability. Standard portable systems face significant price competition, while dedicated interventional and fusion platforms rely more heavily on clinical evidence, installation relationships, and long-term technical support.

Market Segmentation Analysis: Non-invasive bladder volume scanners constitute a separate and high-volume device segment due to their targeted clinical function and deployment outside of specialized ultrasound departments. The core value lies in the rapid assessment of post-void residual urine without catheterization; the automated system identifies the bladder, calculates volume, and transmits the results to the clinical record. Cart-mounted devices remain important in high-frequency hospital environments, while portable and handheld products are better suited for mobility between wards and decentralized diagnostic and treatment procedures.

Dedicated diagnostic and interventional urological ultrasound systems constitute a high-value segment, supporting kidney and bladder imaging, prostate volume measurement, transrectal or transperineal biopsy, treatment guidance, and follow-up. Product differentiation depends on high-resolution B-mode, Doppler and elastography, dedicated endovascular probes, dual-plane simultaneous display, and the ability to fuse with MRI target areas. Portable diagnostic devices occupy a mid-tier segment, offering broader imaging capabilities at a lower procurement cost and higher mobility. Therefore, technological opportunities lie at one end in simplifying routine measurements and at the other in precise navigation of interventional procedures. General-purpose platforms with urological configurations compete for multi-departmental utilization, while specialized systems create value through ergonomic operation, faster surgical preparation, and comprehensive urological software.

Downstream Market Opportunities: Hospitals are the core downstream market, with imaging and bladder assessment needs across urology clinics, operating rooms, emergency departments, rehabilitation departments, and inpatient wards. Urology specialists primarily purchase prostate imaging, biopsy guidance, and long-term follow-up equipment, while emergency and post-operative departments use bladder scans to assess urinary retention and assist in catheterization decisions. Rehabilitation, spinal cord injury, and long-term care facilities present significant opportunities, as patients with neurogenic bladder and mobility disorders may require repeated monitoring of post-

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void residual urine. Day clinics and primary care facilities prefer portable systems with smaller footprints and simpler deployment. In emerging healthcare markets, affordable portable ultrasound and bladder scanners may expand coverage before high-end fusion biopsy platforms. Strong downstream value propositions include reduced invasive measurements, shorter examination times, standardized reporting, and integration with existing clinical records; high-end products also need to demonstrate value in biopsy localization, procedural logging, and compatibility with prostate MRI pathways.

Regional Analysis

North America and Europe are mature, high-value markets for urological ultrasound machines, with well-established urology departments, structured medical device regulatory systems, and clinical pathways supporting residual urine assessment, prostate imaging, and image-guided biopsy. North America has a strong adoption base for artificial intelligence and connected bladder measurement, with several automated bladder and prostate analysis functions recently receiving regulatory approval. Europe has a strong prostate diagnostic system, and the 2026 European guidelines further emphasize MRI-targeted and micro-ultrasound-related biopsy strategies. Customers in both regions highly value regulatory status, clinical validation, electronic health record connectivity, infection control, and full lifecycle services.

The Asia-Pacific region presents stronger long-term equipment expansion opportunities, primarily driven by an aging population, improved diagnostic accessibility, and the expansion of regional ultrasound manufacturing systems. The World Health Organization projects that by 2050, the majority of the world's elderly population will reside in low- and middle-income countries, creating a market with unevenly distributed specialty imaging resources that requires more scalable diagnostic equipment. China, Japan, and South Korea possess both medical device manufacturing capabilities and large hospital systems, while Southeast Asia offers potential for portable and cost-effective systems. Regional companies are expanding their product lines with cart-mounted, portable, and specialized probes and are gradually participating in international market competition.

Competitive Landscape: The urological ultrasound market exhibits a tiered competitive structure, with this study identifying a global pool of fifty manufacturers. Large, integrated ultrasound companies compete primarily based on their extensive installation base, universal imaging platforms, international service networks, and urological-specific probes or software. Specialized urological imaging companies differentiate themselves through high-resolution transrectal and transperineal probes, dual-plane

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imaging, MRI-ultrasound fusion, and surgical navigation capabilities. Specialized bladder scanner companies compete on automated volume measurement, ease of use, durability, infection control, and hospital-wide deployment. Portable and handheld device developers are lowering the spatial and operational barriers to distributed imaging applications through application platforms and AI-assisted bladder or prostate measurements. Regional manufacturers primarily compete in the routine diagnostic and portable device market based on price, local service, and flexible configuration. High-end interventional devices have significantly higher barriers to entry, requiring specialized probes, proven software, clinical cases, and long-term surgical support.

Report Scope

This report studies the global Urology Ultrasound Machine production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Urology Ultrasound Machine total production and demand, 2021-2032, (Units)

Global Urology Ultrasound Machine total production value, 2021-2032, (USD Million)

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

Global Urology Ultrasound Machine consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Urology Ultrasound Machine domestic production, consumption, key domestic manufacturers and share

Global Urology Ultrasound Machine production by manufacturer, production,

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price, value and market share 2021-2026, (USD Million) & (Units)

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

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

This report profiles key players in the global Urology Ultrasound Machine 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., Verathon Inc., Koninklijke Philips N.V., KOELIS SAS, Exact Imaging Inc., BD, Esaote S.p.A., Laborie Medical Technologies Corp., Vitacon AS, EchoNous, Inc., 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 Urology Ultrasound Machine market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (K 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 Urology Ultrasound Machine Market, By Region:

United States

China

Europe

Japan

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South Korea

ASEAN

India

Rest of World

Global Urology Ultrasound Machine Market, Segmentation by Type:

Desktop

Cart-based

Portable

Global Urology Ultrasound Machine Market, Segmentation by Imaging Principle:

Black and White B-mode Ultrasound

Color Doppler

Global Urology Ultrasound Machine Market, Segmentation by Number of Probes:

?2

?3

Global Urology Ultrasound Machine Market, Segmentation by Application:

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Hospitals

Urology Clinics

Day Care Centers

Others

Companies Profiled:

GE HealthCare Technologies Inc.

Verathon Inc.

Koninklijke Philips N.V.

KOELIS SAS

Exact Imaging Inc.

BD

Esaote S.p.A.

Laborie Medical Technologies Corp.

Vitacon AS

EchoNous, Inc.

Butterfly Network, Inc.

Caresono Technology Co., Ltd.

Clarius Mobile Health Corp.

MCube Technology Co., Ltd.

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Suzhou PeakSonic Medical Technology Co., Ltd.

Mianyang Meike Electronic Equipment Co., Ltd.

Guangzhou Sonostar Technologies Co., Ltd.

Xuzhou Kaixin Electronic Instrument Co., Ltd.

Edgecare Inc.

Lilium Otsuka Co., Ltd.

Chengdu MEDIT Technology Co., Ltd.

Key Questions Answered:

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

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