

Global Focused Ultrasound Neuromodulation System Market Growth 2026-2032

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Abstracts

The global Focused Ultrasound Neuromodulation System market size is predicted to grow from US\$ 17.61 million in 2025 to US\$ 43.62 million in 2032; it is expected to grow at a CAGR of 13.4% from 2026 to 2032.

Focused Ultrasound Neuromodulation System refers to a medical and research equipment platform that uses focused ultrasound technology to provide non-invasive stimulation and functional modulation of targeted neural regions. The system generates and focuses low-intensity ultrasound energy through ultrasound transducer arrays to create precise acoustic fields in targeted brain regions or neural tissues, while integrating targeting and navigation technologies, acoustic control systems, and software algorithms to regulate neural activities. The system typically consists of focused ultrasound transducers, ultrasound drive and control modules, targeting/navigation modules, stimulation parameter management software, and necessary imaging or monitoring components. It is primarily applied in neuroscience research, neural circuit modulation, exploration of psychiatric and neurological disorder treatments, pain management, and emerging brain-computer interface research.

Key FindingsThe 2025 global average price of focused ultrasound neuromodulation systems was approximately US\$600,000–900,000 per unit. Complete focused ultrasound neuromodulation platforms remained the major product category. Phased-array transducers and high-precision targeting systems occupied the premium price segment. Psychiatric disorders, chronic pain and brain-computer interface research represented the main growth areas. North America maintained the leading position in technology development and commercial supply.

Market Trends

The focused ultrasound neuromodulation industry is transitioning from laboratory research platforms toward clinical-oriented systems. Product development is increasingly focused on improving transcranial stimulation accuracy, compensating for skull-induced ultrasound distortion, integrating navigation technologies and enabling more adaptive stimulation control. Compared with conventional electrical and magnetic neuromodulation technologies, focused ultrasound provides non-invasive deep neural targeting and improved spatial selectivity, creating new opportunities for precise neural circuit modulation.

The technology roadmap is gradually moving toward intelligent systems integrating imaging guidance, navigation algorithms, acoustic field optimization and adaptive control capabilities. Although commercial deployment remains limited compared with mature neuromodulation technologies, continued advances in clinical validation and regulatory progress are expected to expand future adoption.

Market Dynamics

Drivers

Growing demand for non-invasive neuromodulation technologies is a major driver of market development. Increasing research activity in depression, neurodegenerative diseases, chronic pain and cognitive disorders is accelerating demand for more precise brain stimulation approaches. Focused ultrasound provides a potential solution for deep neural modulation without surgical implantation, supporting long-term technology adoption.

Advances in phased-array transducers, acoustic simulation, AI-based targeting algorithms and personalized skull compensation technologies are improving stimulation accuracy and system performance.

Restraints

Market development remains constrained by limited clinical commercialization, high system costs and the need for additional evidence regarding long-term therapeutic effectiveness. Compared with established technologies such as DBS and TMS, focused ultrasound neuromodulation requires further clinical validation and standardized treatment protocols.

The limited number of commercial suppliers and relatively small installed base also restrict near-term market expansion.

Opportunities

The development of non-invasive brain-computer interfaces, precision psychiatry and personalized neuromodulation provides new opportunities for focused ultrasound systems. Future integration with AI-based neural decoding, adaptive stimulation algorithms and multimodal brain monitoring may expand potential applications.

Asia-Pacific markets, particularly China, are expected to become important growth regions due to increasing investment in neuroscience research, artificial intelligence and medical technology innovation.

Challenges

The industry faces challenges related to regulatory approval, clinical evidence accumulation, manufacturing complexity and cost reduction. Achieving consistent stimulation accuracy through the human skull remains a key technical challenge, while establishing reimbursement pathways will influence long-term clinical commercialization.

Industry Chain Analysis

The focused ultrasound neuromodulation industry chain includes upstream component suppliers, midstream system manufacturers and downstream research and clinical users. Upstream activities include piezoelectric materials, ultrasound transducer manufacturing, electronic control components, imaging technologies and software algorithms. Midstream companies integrate acoustic hardware, control systems, targeting technologies and application software into complete neuromodulation platforms. Downstream users mainly include universities, neuroscience research centers, hospitals and clinical trial organizations.

Value Chain Analysis

Value creation is concentrated in high-precision transducer design, acoustic field control, neural targeting algorithms and system integration capabilities. Compared with conventional ultrasound equipment, focused ultrasound neuromodulation systems require stronger hardware-software integration, resulting in higher technical barriers and

greater value concentration among specialized platform providers.

Segment Insights

By product structure, complete neuromodulation systems represent the largest commercial segment because users typically require integrated stimulation, targeting and control capabilities. By technology route, low-intensity focused ultrasound and transcranial focused ultrasound remain the dominant approaches. By system configuration, image-guided and navigation-assisted systems represent higher-value configurations, while closed-loop focused ultrasound neuromodulation remains an emerging technology direction rather than a mainstream commercial segment.

Downstream Market Opportunities

Academic and research institutions remain the primary customer group, supported by neuroscience studies and clinical exploration programs. Psychiatric disorders, chronic pain, neurodegenerative diseases and brain-computer interface research represent promising downstream opportunities. As clinical evidence continues to accumulate, focused ultrasound neuromodulation is expected to gradually expand from research applications toward therapeutic medical applications.

Regional Insights

North America represents the leading regional market due to its strong neuroscience research foundation, advanced medical device ecosystem and concentration of early-stage technology developers. Europe maintains strengths in medical imaging, neuroscience research and translational applications. Asia-Pacific, particularly China, represents an emerging growth region driven by increasing investment in brain science, artificial intelligence and medical technology innovation. Japan and South Korea have strong ultrasound and medical device capabilities but currently have limited confirmed commercial suppliers in focused ultrasound neuromodulation.

Competitive Landscape Analysis

The global competitive landscape remains highly concentrated, with supply mainly centered in North America and Israel. The market is characterized by a limited number of specialized technology companies and emerging innovators rather than large-scale medical device manufacturers. Regional competition mainly focuses on ultrasound engineering capabilities, neural targeting accuracy, clinical collaboration networks and

regulatory progress. North America currently leads commercialization activities, while Asia-Pacific companies are mainly positioned in technology development and future market entry.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Focused Ultrasound Neuromodulation System Industry Forecast" looks at past sales and reviews total world Focused Ultrasound Neuromodulation System sales in 2025, providing a comprehensive analysis by region and market sector of projected Focused Ultrasound Neuromodulation System sales for 2026 through 2032. With Focused Ultrasound Neuromodulation System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Focused Ultrasound Neuromodulation System industry.

This Insight Report provides a comprehensive analysis of the global Focused Ultrasound Neuromodulation System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Focused Ultrasound Neuromodulation System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Focused Ultrasound Neuromodulation System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Focused Ultrasound Neuromodulation System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Focused Ultrasound Neuromodulation System.

This report presents a comprehensive overview, market shares, and growth opportunities of Focused Ultrasound Neuromodulation System market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Complete Neuromodulation System

Transducer-based Neuromodulation Platform

Wearable Focused Ultrasound System

Others

Segmentation by Technology Route:

Low Intensity Focused Ultrasound (LIFU)

Transcranial Focused Ultrasound Stimulation (tFUS)

Phased Array Ultrasound Neuromodulation

Single-element Focused Ultrasound

Others

Segmentation by System Configuration:

Image-guided Neuromodulation System

Neuronavigation-guided System

Closed-loop Neuromodulation System

Open-loop Neuromodulation System

Others

Segmentation by Application:

Neuroscience Research

Psychiatric Disorder Neuromodulation Research

Neurological Disease Research

Pain Management Research

Brain Computer Interface Research

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Insightec

Sonic Concepts Inc.

BrainSonix Corporation

Soterix Medical

SPIRE Bioventures

Attune Neurosciences

Grey Matter Neurosciences

Huachao Neurocontrol Technology Co., Ltd.

Kongshan Ci Technology Co., Ltd.

Huakang Chaonao Technology Co., Ltd.

Gestalt Technology Co., Ltd.

HIFUPlex Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Focused Ultrasound Neuromodulation System market?

What factors are driving Focused Ultrasound Neuromodulation System market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Focused Ultrasound Neuromodulation System market opportunities vary by end market size?

How does Focused Ultrasound Neuromodulation System break out by Type, by Application?

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