

# Global Ultrasonic Fetal Monitor Market Growth 2026-2032

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## Abstracts

The global Ultrasonic Fetal Monitor market size is predicted to grow from US\$ 2766 million in 2025 to US\$ 4022 million in 2032; it is expected to grow at a CAGR of 5.6% from 2026 to 2032.

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.

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

This Insight Report provides a comprehensive analysis of the global Ultrasonic Fetal Monitor 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 Ultrasonic Fetal Monitor portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Ultrasonic Fetal Monitor market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Ultrasonic Fetal Monitor 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 Ultrasonic Fetal Monitor.

This report presents a comprehensive overview, market shares, and growth opportunities of Ultrasonic Fetal Monitor market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Handheld

Desktop

#### Segmentation by Technology:

Continuous Wave Doppler

Pulse Wave Doppler

#### Segmentation by Monitoring Mode:

Wired Type

Wireless Type

#### Segmentation by Application:

Prenatal Monitoring

Postnatal Monitoring

Monitoring During Delivery

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.

SonoStar

Philips

EDANUSA

Meditech Group

GE HealthCare

Lian-med

Medzer

Kalstein

TOITU

MeCanMedical

Dinyimedical

Heal Force

LUCKCOME

Key Questions Addressed in this Report

What is the 10-year outlook for the global Ultrasonic Fetal Monitor market?

What factors are driving Ultrasonic Fetal Monitor market growth, globally and by region?  
Which technologies are poised for the fastest growth by market and region?  
How do Ultrasonic Fetal Monitor market opportunities vary by end market size?  
How does Ultrasonic Fetal Monitor break out by Type, by Application?

## Contents

### 1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

### 2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
  - 2.1.1 Global Ultrasonic Fetal Monitor Annual Sales 2021-2032
  - 2.1.2 World Current & Future Analysis for Ultrasonic Fetal Monitor by Geographic Region, 2021, 2025 & 2032
  - 2.1.3 World Current & Future Analysis for Ultrasonic Fetal Monitor by Country/Region, 2021, 2025 & 2032
- 2.2 Ultrasonic Fetal Monitor Segment by Type
  - 2.2.1 Handheld
  - 2.2.2 Desktop
  - 2.2.3 Ultrasonic Fetal Monitor Sales by Type
    - 2.2.3.1 Global Ultrasonic Fetal Monitor Sales Market Share by Type (2021-2026)
    - 2.2.3.2 Global Ultrasonic Fetal Monitor Revenue and Market Share by Type (2021-2026)
    - 2.2.3.3 Global Ultrasonic Fetal Monitor Sale Price by Type (2021-2026)
- 2.3 Ultrasonic Fetal Monitor Segment by Technology
  - 2.3.1 Continuous Wave Doppler
  - 2.3.2 Pulse Wave Doppler
  - 2.3.3 Ultrasonic Fetal Monitor Sales by Technology
    - 2.3.3.1 Global Ultrasonic Fetal Monitor Sales Market Share by Technology (2021-2026)
    - 2.3.3.2 Global Ultrasonic Fetal Monitor Revenue and Market Share by Technology (2021-2026)
    - 2.3.3.3 Global Ultrasonic Fetal Monitor Sale Price by Technology (2021-2026)
- 2.4 Ultrasonic Fetal Monitor Segment by Monitoring Mode

2.4.1 Wired Type

2.4.2 Wireless Type

2.4.3 Ultrasonic Fetal Monitor Sales by Monitoring Mode

2.4.3.1 Global Ultrasonic Fetal Monitor Sales Market Share by Monitoring Mode (2021-2026)

2.4.3.2 Global Ultrasonic Fetal Monitor Revenue and Market Share by Monitoring Mode (2021-2026)

2.4.3.3 Global Ultrasonic Fetal Monitor Sale Price by Monitoring Mode (2021-2026)

2.5 Ultrasonic Fetal Monitor Segment by Application

2.5.1 Prenatal Monitoring

2.5.2 Postnatal Monitoring

2.5.3 Monitoring During Delivery

2.5.4 Others

2.5.5 Ultrasonic Fetal Monitor Sales by Application

2.5.5.1 Global Ultrasonic Fetal Monitor Sale Market Share by Application (2021-2026)

2.5.5.2 Global Ultrasonic Fetal Monitor Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Ultrasonic Fetal Monitor Sale Price by Application (2021-2026)

### **3 GLOBAL BY COMPANY**

3.1 Global Ultrasonic Fetal Monitor Breakdown Data by Company

3.1.1 Global Ultrasonic Fetal Monitor Annual Sales by Company (2021-2026)

3.1.2 Global Ultrasonic Fetal Monitor Sales Market Share by Company (2021-2026)

3.2 Global Ultrasonic Fetal Monitor Annual Revenue by Company (2021-2026)

3.2.1 Global Ultrasonic Fetal Monitor Revenue by Company (2021-2026)

3.2.2 Global Ultrasonic Fetal Monitor Revenue Market Share by Company (2021-2026)

3.3 Global Ultrasonic Fetal Monitor Sale Price by Company

3.4 Key Manufacturers Ultrasonic Fetal Monitor Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Ultrasonic Fetal Monitor Product Location Distribution

3.4.2 Players Ultrasonic Fetal Monitor Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

### **4 WORLD HISTORIC REVIEW FOR ULTRASONIC FETAL MONITOR BY**

## **GEOGRAPHIC REGION**

### **4.1 World Historic Ultrasonic Fetal Monitor Market Size by Geographic Region (2021-2026)**

#### **4.1.1 Global Ultrasonic Fetal Monitor Annual Sales by Geographic Region (2021-2026)**

#### **4.1.2 Global Ultrasonic Fetal Monitor Annual Revenue by Geographic Region (2021-2026)**

### **4.2 World Historic Ultrasonic Fetal Monitor Market Size by Country/Region (2021-2026)**

#### **4.2.1 Global Ultrasonic Fetal Monitor Annual Sales by Country/Region (2021-2026)**

#### **4.2.2 Global Ultrasonic Fetal Monitor Annual Revenue by Country/Region (2021-2026)**

### **4.3 Americas Ultrasonic Fetal Monitor Sales Growth**

### **4.4 APAC Ultrasonic Fetal Monitor Sales Growth**

### **4.5 Europe Ultrasonic Fetal Monitor Sales Growth**

### **4.6 Middle East & Africa Ultrasonic Fetal Monitor Sales Growth**

## **5 AMERICAS**

### **5.1 Americas Ultrasonic Fetal Monitor Sales by Country**

#### **5.1.1 Americas Ultrasonic Fetal Monitor Sales by Country (2021-2026)**

#### **5.1.2 Americas Ultrasonic Fetal Monitor Revenue by Country (2021-2026)**

### **5.2 Americas Ultrasonic Fetal Monitor Sales by Type (2021-2026)**

### **5.3 Americas Ultrasonic Fetal Monitor Sales by Application (2021-2026)**

### **5.4 United States**

### **5.5 Canada**

### **5.6 Mexico**

### **5.7 Brazil**

## **6 APAC**

### **6.1 APAC Ultrasonic Fetal Monitor Sales by Region**

#### **6.1.1 APAC Ultrasonic Fetal Monitor Sales by Region (2021-2026)**

#### **6.1.2 APAC Ultrasonic Fetal Monitor Revenue by Region (2021-2026)**

### **6.2 APAC Ultrasonic Fetal Monitor Sales by Type (2021-2026)**

### **6.3 APAC Ultrasonic Fetal Monitor Sales by Application (2021-2026)**

### **6.4 China**

### **6.5 Japan**

### **6.6 South Korea**

### **6.7 Southeast Asia**

### **6.8 India**

6.9 Australia

6.10 China Taiwan

## **7 EUROPE**

7.1 Europe Ultrasonic Fetal Monitor by Country

7.1.1 Europe Ultrasonic Fetal Monitor Sales by Country (2021-2026)

7.1.2 Europe Ultrasonic Fetal Monitor Revenue by Country (2021-2026)

7.2 Europe Ultrasonic Fetal Monitor Sales by Type (2021-2026)

7.3 Europe Ultrasonic Fetal Monitor Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

## **8 MIDDLE EAST & AFRICA**

8.1 Middle East & Africa Ultrasonic Fetal Monitor by Country

8.1.1 Middle East & Africa Ultrasonic Fetal Monitor Sales by Country (2021-2026)

8.1.2 Middle East & Africa Ultrasonic Fetal Monitor Revenue by Country (2021-2026)

8.2 Middle East & Africa Ultrasonic Fetal Monitor Sales by Type (2021-2026)

8.3 Middle East & Africa Ultrasonic Fetal Monitor Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

## **9 MARKET DRIVERS, CHALLENGES AND TRENDS**

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

## **10 MANUFACTURING COST STRUCTURE ANALYSIS**

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Ultrasonic Fetal Monitor

10.3 Manufacturing Process Analysis of Ultrasonic Fetal Monitor

10.4 Industry Chain Structure of Ultrasonic Fetal Monitor

## **11 MARKETING, DISTRIBUTORS AND CUSTOMER**

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Ultrasonic Fetal Monitor Distributors

11.3 Ultrasonic Fetal Monitor Customer

## **12 WORLD FORECAST REVIEW FOR ULTRASONIC FETAL MONITOR BY GEOGRAPHIC REGION**

12.1 Global Ultrasonic Fetal Monitor Market Size Forecast by Region

12.1.1 Global Ultrasonic Fetal Monitor Forecast by Region (2027-2032)

12.1.2 Global Ultrasonic Fetal Monitor Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Ultrasonic Fetal Monitor Forecast by Type (2027-2032)

12.7 Global Ultrasonic Fetal Monitor Forecast by Application (2027-2032)

## **13 KEY PLAYERS ANALYSIS**

13.1 SonoStar

13.1.1 SonoStar Company Information

13.1.2 SonoStar Ultrasonic Fetal Monitor Product Portfolios and Specifications

13.1.3 SonoStar Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 SonoStar Main Business Overview

13.1.5 SonoStar Latest Developments

13.2 Philips

13.2.1 Philips Company Information

13.2.2 Philips Ultrasonic Fetal Monitor Product Portfolios and Specifications

13.2.3 Philips Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.2.4 Philips Main Business Overview
- 13.2.5 Philips Latest Developments
- 13.3 EDANUSA
  - 13.3.1 EDANUSA Company Information
  - 13.3.2 EDANUSA Ultrasonic Fetal Monitor Product Portfolios and Specifications
  - 13.3.3 EDANUSA Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.3.4 EDANUSA Main Business Overview
  - 13.3.5 EDANUSA Latest Developments
- 13.4 Meditech Group
  - 13.4.1 Meditech Group Company Information
  - 13.4.2 Meditech Group Ultrasonic Fetal Monitor Product Portfolios and Specifications
  - 13.4.3 Meditech Group Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.4.4 Meditech Group Main Business Overview
  - 13.4.5 Meditech Group Latest Developments
- 13.5 GE HealthCare
  - 13.5.1 GE HealthCare Company Information
  - 13.5.2 GE HealthCare Ultrasonic Fetal Monitor Product Portfolios and Specifications
  - 13.5.3 GE HealthCare Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.5.4 GE HealthCare Main Business Overview
  - 13.5.5 GE HealthCare Latest Developments
- 13.6 Lian-med
  - 13.6.1 Lian-med Company Information
  - 13.6.2 Lian-med Ultrasonic Fetal Monitor Product Portfolios and Specifications
  - 13.6.3 Lian-med Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.6.4 Lian-med Main Business Overview
  - 13.6.5 Lian-med Latest Developments
- 13.7 Medzer
  - 13.7.1 Medzer Company Information
  - 13.7.2 Medzer Ultrasonic Fetal Monitor Product Portfolios and Specifications
  - 13.7.3 Medzer Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.7.4 Medzer Main Business Overview
  - 13.7.5 Medzer Latest Developments
- 13.8 Kalstein
  - 13.8.1 Kalstein Company Information

- 13.8.2 Kalstein Ultrasonic Fetal Monitor Product Portfolios and Specifications
- 13.8.3 Kalstein Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.8.4 Kalstein Main Business Overview
- 13.8.5 Kalstein Latest Developments
- 13.9 TOITU
  - 13.9.1 TOITU Company Information
  - 13.9.2 TOITU Ultrasonic Fetal Monitor Product Portfolios and Specifications
  - 13.9.3 TOITU Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.9.4 TOITU Main Business Overview
  - 13.9.5 TOITU Latest Developments
- 13.10 MeCanMedical
  - 13.10.1 MeCanMedical Company Information
  - 13.10.2 MeCanMedical Ultrasonic Fetal Monitor Product Portfolios and Specifications
  - 13.10.3 MeCanMedical Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.10.4 MeCanMedical Main Business Overview
  - 13.10.5 MeCanMedical Latest Developments
- 13.11 Dinyimedical
  - 13.11.1 Dinyimedical Company Information
  - 13.11.2 Dinyimedical Ultrasonic Fetal Monitor Product Portfolios and Specifications
  - 13.11.3 Dinyimedical Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.11.4 Dinyimedical Main Business Overview
  - 13.11.5 Dinyimedical Latest Developments
- 13.12 Heal Force
  - 13.12.1 Heal Force Company Information
  - 13.12.2 Heal Force Ultrasonic Fetal Monitor Product Portfolios and Specifications
  - 13.12.3 Heal Force Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.12.4 Heal Force Main Business Overview
  - 13.12.5 Heal Force Latest Developments
- 13.13 LUCKCOME
  - 13.13.1 LUCKCOME Company Information
  - 13.13.2 LUCKCOME Ultrasonic Fetal Monitor Product Portfolios and Specifications
  - 13.13.3 LUCKCOME Ultrasonic Fetal Monitor Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.13.4 LUCKCOME Main Business Overview

#### 13.13.5 LUCKCOME Latest Developments

### **14 RESEARCH FINDINGS AND CONCLUSION**

## List Of Tables

### LIST OF TABLES

Table 1. Ultrasonic Fetal Monitor Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Ultrasonic Fetal Monitor Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Handheld

Table 4. Major Players of Desktop

Table 5. Global Ultrasonic Fetal Monitor Sales by Type (2021-2026) & (K Units)

Table 6. Global Ultrasonic Fetal Monitor Sales Market Share by Type (2021-2026)

Table 7. Global Ultrasonic Fetal Monitor Revenue by Type (2021-2026) & (\$ million)

Table 8. Global Ultrasonic Fetal Monitor Revenue Market Share by Type (2021-2026)

Table 9. Global Ultrasonic Fetal Monitor Sale Price by Type (2021-2026) & (US\$/Unit)

Table 10. Major Players of Continuous Wave Doppler

Table 11. Major Players of Pulse Wave Doppler

Table 12. Global Ultrasonic Fetal Monitor Sales by Technology (2021-2026) & (K Units)

Table 13. Global Ultrasonic Fetal Monitor Sales Market Share by Technology (2021-2026)

Table 14. Global Ultrasonic Fetal Monitor Revenue by Technology (2021-2026) & (\$ million)

Table 15. Global Ultrasonic Fetal Monitor Revenue Market Share by Technology (2021-2026)

Table 16. Global Ultrasonic Fetal Monitor Sale Price by Technology (2021-2026) & (US\$/Unit)

Table 17. Major Players of Wired Type

Table 18. Major Players of Wireless Type

Table 19. Global Ultrasonic Fetal Monitor Sales by Monitoring Mode (2021-2026) & (K Units)

Table 20. Global Ultrasonic Fetal Monitor Sales Market Share by Monitoring Mode (2021-2026)

Table 21. Global Ultrasonic Fetal Monitor Revenue by Monitoring Mode (2021-2026) & (\$ million)

Table 22. Global Ultrasonic Fetal Monitor Revenue Market Share by Monitoring Mode (2021-2026)

Table 23. Global Ultrasonic Fetal Monitor Sale Price by Monitoring Mode (2021-2026) & (US\$/Unit)

Table 24. Global Ultrasonic Fetal Monitor Sale by Application (2021-2026) & (K Units)

Table 25. Global Ultrasonic Fetal Monitor Sale Market Share by Application (2021-2026)

Table 26. Global Ultrasonic Fetal Monitor Revenue by Application (2021-2026) & (\$ million)

Table 27. Global Ultrasonic Fetal Monitor Revenue Market Share by Application (2021-2026)

Table 28. Global Ultrasonic Fetal Monitor Sale Price by Application (2021-2026) & (US\$/Unit)

Table 29. Global Ultrasonic Fetal Monitor Sales by Company (2021-2026) & (K Units)

Table 30. Global Ultrasonic Fetal Monitor Sales Market Share by Company (2021-2026)

Table 31. Global Ultrasonic Fetal Monitor Revenue by Company (2021-2026) & (\$ millions)

Table 32. Global Ultrasonic Fetal Monitor Revenue Market Share by Company (2021-2026)

Table 33. Global Ultrasonic Fetal Monitor Sale Price by Company (2021-2026) & (US\$/Unit)

Table 34. Key Manufacturers Ultrasonic Fetal Monitor Producing Area Distribution and Sales Area

Table 35. Players Ultrasonic Fetal Monitor Products Offered

Table 36. Ultrasonic Fetal Monitor Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 37. New Products and Potential Entrants

Table 38. Market M&A Activity & Strategy

Table 39. Global Ultrasonic Fetal Monitor Sales by Geographic Region (2021-2026) & (K Units)

Table 40. Global Ultrasonic Fetal Monitor Sales Market Share Geographic Region (2021-2026)

Table 41. Global Ultrasonic Fetal Monitor Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 42. Global Ultrasonic Fetal Monitor Revenue Market Share by Geographic Region (2021-2026)

Table 43. Global Ultrasonic Fetal Monitor Sales by Country/Region (2021-2026) & (K Units)

Table 44. Global Ultrasonic Fetal Monitor Sales Market Share by Country/Region (2021-2026)

Table 45. Global Ultrasonic Fetal Monitor Revenue by Country/Region (2021-2026) & (\$ millions)

Table 46. Global Ultrasonic Fetal Monitor Revenue Market Share by Country/Region (2021-2026)

Table 47. Americas Ultrasonic Fetal Monitor Sales by Country (2021-2026) & (K Units)

|                                                                                                      |
|------------------------------------------------------------------------------------------------------|
| Table 48. Americas Ultrasonic Fetal Monitor Sales Market Share by Country (2021-2026)                |
| Table 49. Americas Ultrasonic Fetal Monitor Revenue by Country (2021-2026) & (\$ millions)           |
| Table 50. Americas Ultrasonic Fetal Monitor Sales by Type (2021-2026) & (K Units)                    |
| Table 51. Americas Ultrasonic Fetal Monitor Sales by Application (2021-2026) & (K Units)             |
| Table 52. APAC Ultrasonic Fetal Monitor Sales by Region (2021-2026) & (K Units)                      |
| Table 53. APAC Ultrasonic Fetal Monitor Sales Market Share by Region (2021-2026)                     |
| Table 54. APAC Ultrasonic Fetal Monitor Revenue by Region (2021-2026) & (\$ millions)                |
| Table 55. APAC Ultrasonic Fetal Monitor Sales by Type (2021-2026) & (K Units)                        |
| Table 56. APAC Ultrasonic Fetal Monitor Sales by Application (2021-2026) & (K Units)                 |
| Table 57. Europe Ultrasonic Fetal Monitor Sales by Country (2021-2026) & (K Units)                   |
| Table 58. Europe Ultrasonic Fetal Monitor Revenue by Country (2021-2026) & (\$ millions)             |
| Table 59. Europe Ultrasonic Fetal Monitor Sales by Type (2021-2026) & (K Units)                      |
| Table 60. Europe Ultrasonic Fetal Monitor Sales by Application (2021-2026) & (K Units)               |
| Table 61. Middle East & Africa Ultrasonic Fetal Monitor Sales by Country (2021-2026) & (K Units)     |
| Table 62. Middle East & Africa Ultrasonic Fetal Monitor Revenue Market Share by Country (2021-2026)  |
| Table 63. Middle East & Africa Ultrasonic Fetal Monitor Sales by Type (2021-2026) & (K Units)        |
| Table 64. Middle East & Africa Ultrasonic Fetal Monitor Sales by Application (2021-2026) & (K Units) |
| Table 65. Key Market Drivers & Growth Opportunities of Ultrasonic Fetal Monitor                      |
| Table 66. Key Market Challenges & Risks of Ultrasonic Fetal Monitor                                  |
| Table 67. Key Industry Trends of Ultrasonic Fetal Monitor                                            |
| Table 68. Ultrasonic Fetal Monitor Raw Material                                                      |
| Table 69. Key Suppliers of Raw Materials                                                             |
| Table 70. Ultrasonic Fetal Monitor Distributors List                                                 |
| Table 71. Ultrasonic Fetal Monitor Customer List                                                     |
| Table 72. Global Ultrasonic Fetal Monitor Sales Forecast by Region (2027-2032) & (K Units)           |
| Table 73. Global Ultrasonic Fetal Monitor Revenue Forecast by Region (2027-2032) & (\$ millions)     |
| Table 74. Americas Ultrasonic Fetal Monitor Sales Forecast by Country (2027-2032) & (K Units)        |
| Table 75. Americas Ultrasonic Fetal Monitor Annual Revenue Forecast by Country                       |

(2027-2032) & (\$ millions)

Table 76. APAC Ultrasonic Fetal Monitor Sales Forecast by Region (2027-2032) & (K Units)

Table 77. APAC Ultrasonic Fetal Monitor Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 78. Europe Ultrasonic Fetal Monitor Sales Forecast by Country (2027-2032) & (K Units)

Table 79. Europe Ultrasonic Fetal Monitor Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 80. Middle East & Africa Ultrasonic Fetal Monitor Sales Forecast by Country (2027-2032) & (K Units)

Table 81. Middle East & Africa Ultrasonic Fetal Monitor Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. Global Ultrasonic Fetal Monitor Sales Forecast by Type (2027-2032) & (K Units)

Table 83. Global Ultrasonic Fetal Monitor Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 84. Global Ultrasonic Fetal Monitor Sales Forecast by Application (2027-2032) & (K Units)

Table 85. Global Ultrasonic Fetal Monitor Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 86. SonoStar Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 87. SonoStar Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 88. SonoStar Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 89. SonoStar Main Business

Table 90. SonoStar Latest Developments

Table 91. Philips Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 92. Philips Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 93. Philips Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 94. Philips Main Business

Table 95. Philips Latest Developments

Table 96. EDANUSA Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 97. EDANUSA Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 98. EDANUSA Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million),

Price (US\$/Unit) and Gross Margin (2021-2026)

Table 99. EDANUSA Main Business

Table 100. EDANUSA Latest Developments

Table 101. Meditech Group Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 102. Meditech Group Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 103. Meditech Group Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 104. Meditech Group Main Business

Table 105. Meditech Group Latest Developments

Table 106. GE HealthCare Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 107. GE HealthCare Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 108. GE HealthCare Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 109. GE HealthCare Main Business

Table 110. GE HealthCare Latest Developments

Table 111. Lian-med Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 112. Lian-med Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 113. Lian-med Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 114. Lian-med Main Business

Table 115. Lian-med Latest Developments

Table 116. Medzer Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 117. Medzer Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 118. Medzer Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 119. Medzer Main Business

Table 120. Medzer Latest Developments

Table 121. Kalstein Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 122. Kalstein Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 123. Kalstein Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 124. Kalstein Main Business

Table 125. Kalstein Latest Developments

Table 126. TOITU Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 127. TOITU Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 128. TOITU Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 129. TOITU Main Business

Table 130. TOITU Latest Developments

Table 131. MeCanMedical Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 132. MeCanMedical Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 133. MeCanMedical Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 134. MeCanMedical Main Business

Table 135. MeCanMedical Latest Developments

Table 136. Dinyimedical Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 137. Dinyimedical Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 138. Dinyimedical Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 139. Dinyimedical Main Business

Table 140. Dinyimedical Latest Developments

Table 141. Heal Force Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 142. Heal Force Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 143. Heal Force Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 144. Heal Force Main Business

Table 145. Heal Force Latest Developments

Table 146. LUCKCOME Basic Information, Ultrasonic Fetal Monitor Manufacturing Base, Sales Area and Its Competitors

Table 147. LUCKCOME Ultrasonic Fetal Monitor Product Portfolios and Specifications

Table 148. LUCKCOME Ultrasonic Fetal Monitor Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 149. LUCKCOME Main Business

Table 150. LUCKCOME Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of Ultrasonic Fetal Monitor
- Figure 2. Ultrasonic Fetal Monitor Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Ultrasonic Fetal Monitor Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global Ultrasonic Fetal Monitor Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Ultrasonic Fetal Monitor Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Ultrasonic Fetal Monitor Sales Market Share by Country/Region (2025)
- Figure 10. Ultrasonic Fetal Monitor Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Handheld
- Figure 12. Product Picture of Desktop
- Figure 13. Global Ultrasonic Fetal Monitor Sales Market Share by Type in 2026
- Figure 14. Global Ultrasonic Fetal Monitor Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of Continuous Wave Doppler
- Figure 16. Product Picture of Pulse Wave Doppler
- Figure 17. Global Ultrasonic Fetal Monitor Sales Market Share by Technology in 2026
- Figure 18. Global Ultrasonic Fetal Monitor Revenue Market Share by Technology (2021-2026)
- Figure 19. Product Picture of Wired Type
- Figure 20. Product Picture of Wireless Type
- Figure 21. Global Ultrasonic Fetal Monitor Sales Market Share by Monitoring Mode in 2026
- Figure 22. Global Ultrasonic Fetal Monitor Revenue Market Share by Monitoring Mode (2021-2026)
- Figure 23. Ultrasonic Fetal Monitor Consumed in Prenatal Monitoring
- Figure 24. Global Ultrasonic Fetal Monitor Market: Prenatal Monitoring (2021-2026) & (K Units)
- Figure 25. Ultrasonic Fetal Monitor Consumed in Postnatal Monitoring
- Figure 26. Global Ultrasonic Fetal Monitor Market: Postnatal Monitoring (2021-2026) & (K Units)
- Figure 27. Ultrasonic Fetal Monitor Consumed in Monitoring During Delivery
- Figure 28. Global Ultrasonic Fetal Monitor Market: Monitoring During Delivery

(2021-2026) & (K Units)

Figure 29. Ultrasonic Fetal Monitor Consumed in Others

Figure 30. Global Ultrasonic Fetal Monitor Market: Others (2021-2026) & (K Units)

Figure 31. Global Ultrasonic Fetal Monitor Sale Market Share by Application (2025)

Figure 32. Global Ultrasonic Fetal Monitor Revenue Market Share by Application in 2026

Figure 33. Ultrasonic Fetal Monitor Sales by Company in 2026 (K Units)

Figure 34. Global Ultrasonic Fetal Monitor Sales Market Share by Company in 2026

Figure 35. Ultrasonic Fetal Monitor Revenue by Company in 2026 (\$ millions)

Figure 36. Global Ultrasonic Fetal Monitor Revenue Market Share by Company in 2026

Figure 37. Global Ultrasonic Fetal Monitor Sales Market Share by Geographic Region (2021-2026)

Figure 38. Global Ultrasonic Fetal Monitor Revenue Market Share by Geographic Region in 2026

Figure 39. Americas Ultrasonic Fetal Monitor Sales 2021-2026 (K Units)

Figure 40. Americas Ultrasonic Fetal Monitor Revenue 2021-2026 (\$ millions)

Figure 41. APAC Ultrasonic Fetal Monitor Sales 2021-2026 (K Units)

Figure 42. APAC Ultrasonic Fetal Monitor Revenue 2021-2026 (\$ millions)

Figure 43. Europe Ultrasonic Fetal Monitor Sales 2021-2026 (K Units)

Figure 44. Europe Ultrasonic Fetal Monitor Revenue 2021-2026 (\$ millions)

Figure 45. Middle East & Africa Ultrasonic Fetal Monitor Sales 2021-2026 (K Units)

Figure 46. Middle East & Africa Ultrasonic Fetal Monitor Revenue 2021-2026 (\$ millions)

Figure 47. Americas Ultrasonic Fetal Monitor Sales Market Share by Country in 2026

Figure 48. Americas Ultrasonic Fetal Monitor Revenue Market Share by Country (2021-2026)

Figure 49. Americas Ultrasonic Fetal Monitor Sales Market Share by Type (2021-2026)

Figure 50. Americas Ultrasonic Fetal Monitor Sales Market Share by Application (2021-2026)

Figure 51. United States Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 52. Canada Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 53. Mexico Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 54. Brazil Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 55. APAC Ultrasonic Fetal Monitor Sales Market Share by Region in 2026

Figure 56. APAC Ultrasonic Fetal Monitor Revenue Market Share by Region (2021-2026)

Figure 57. APAC Ultrasonic Fetal Monitor Sales Market Share by Type (2021-2026)

Figure 58. APAC Ultrasonic Fetal Monitor Sales Market Share by Application

(2021-2026)

Figure 59. China Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 60. Japan Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 61. South Korea Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 62. Southeast Asia Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 63. India Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 64. Australia Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 65. China Taiwan Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 66. Europe Ultrasonic Fetal Monitor Sales Market Share by Country in 2026

Figure 67. Europe Ultrasonic Fetal Monitor Revenue Market Share by Country (2021-2026)

Figure 68. Europe Ultrasonic Fetal Monitor Sales Market Share by Type (2021-2026)

Figure 69. Europe Ultrasonic Fetal Monitor Sales Market Share by Application (2021-2026)

Figure 70. Germany Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 71. France Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 72. UK Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 73. Italy Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 74. Russia Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 75. Middle East & Africa Ultrasonic Fetal Monitor Sales Market Share by Country (2021-2026)

Figure 76. Middle East & Africa Ultrasonic Fetal Monitor Sales Market Share by Type (2021-2026)

Figure 77. Middle East & Africa Ultrasonic Fetal Monitor Sales Market Share by Application (2021-2026)

Figure 78. Egypt Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 79. South Africa Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 80. Israel Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 81. Turkey Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 82. GCC Countries Ultrasonic Fetal Monitor Revenue Growth 2021-2026 (\$ millions)

Figure 83. Manufacturing Cost Structure Analysis of Ultrasonic Fetal Monitor in 2026

Figure 84. Manufacturing Process Analysis of Ultrasonic Fetal Monitor

Figure 85. Industry Chain Structure of Ultrasonic Fetal Monitor

Figure 86. Channels of Distribution

Figure 87. Global Ultrasonic Fetal Monitor Sales Market Forecast by Region  
(2027-2032)

Figure 88. Global Ultrasonic Fetal Monitor Revenue Market Share Forecast by Region  
(2027-2032)

Figure 89. Global Ultrasonic Fetal Monitor Sales Market Share Forecast by Type  
(2027-2032)

Figure 90. Global Ultrasonic Fetal Monitor Revenue Market Share Forecast by Type  
(2027-2032)

Figure 91. Global Ultrasonic Fetal Monitor Sales Market Share Forecast by Application  
(2027-2032)

Figure 92. Global Ultrasonic Fetal Monitor Revenue Market Share Forecast by  
Application (2027-2032)

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