

# Global Ultrasound AI Platform Market Growth (Status and Outlook) 2026-2032

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## Abstracts

The global Ultrasound AI Platform market size is predicted to grow from US\$ 792 million in 2025 to US\$ 2502 million in 2032; it is expected to grow at a CAGR of 17.9% from 2026 to 2032.

In 2025, the number of active paying accounts for Ultrasound AI Platforms globally is estimated at around 45,000. Primarily charged on a 'device-side licensing + cloud algorithm subscription' model, the average monthly subscription price is around \$1,500 per device (varying significantly depending on whether it includes modules for automatic structural recognition, automated measurement, remote quality control, and cloud-based case management). The main sources of demand include prenatal screening, cardiac ultrasound, emergency care, and point-of-care ultrasound (POCUS) scenarios. The European and American markets account for approximately 60% of the market, with large obstetrics and gynecology and cardiovascular centers in North America being the core paying customers; growth is accelerating in the Asia-Pacific region (China, Japan, and Singapore). These products are no longer considered hardware assets in the healthcare system, but rather 'algorithm-layer infrastructure' embedded in the imaging workflow. Their value lies in improving examination consistency, reducing human measurement errors, and enhancing operability for primary care physicians. Ultrasound AI Platforms are digital platforms that use deep learning models and real-time image recognition algorithms to transform 2D/3D images acquired by ultrasound equipment into automatic structural recognition, automated measurement, and intelligent diagnostic prompts. Its core purpose is not to replace ultrasound physicians, but rather to serve as a standardized auxiliary decision-making layer in highly variable imaging scenarios. Compared to traditional ultrasound procedures that rely on manual identification and measurement, the AI ??platform can achieve highly consistent output in areas such as heart chamber size measurement, fetal structure screening, and

abnormal risk alerts, making it a standardized tool for procedures in obstetric, cardiovascular, and emergency ultrasound. With increased computing power and expanded data scale, the platform is evolving from an 'automatic measurement tool' to a 'real-time clinical decision support system.'

## Manufacturer Features

**BrightHeart:** Focuses on algorithms for automatic fetal heart structure recognition and anomaly screening, enhancing the automatic analysis capabilities of prenatal ultrasound. **Sonio:** Builds an intelligent decision support system around prenatal screening, combining clinical databases with AI algorithms. **Caption Health:** Continuously iterates on algorithms for automatic cardiac ultrasound acquisition and real-time guidance, enabling operation by non-specialist physicians. **Butterfly Network:** Embeds AI algorithms into portable ultrasound devices, achieving integrated hardware and software deployment. **GE HealthCare:** Embeds AI automatic measurement and structure recognition modules into traditional ultrasound platforms, achieving platform-level upgrades.

## Breakthrough Point

For Ultrasound AI Platform manufacturers, the real breakthrough lies not in simply improving the accuracy of individual measurements, but in building a system capability of 'data scale + continuous algorithm iteration + clinical closed-loop validation.' For example, GE HealthCare deeply integrates AI automatic measurement modules with clinical workflows in its next-generation ultrasound system, achieving real-time structure recognition and anomaly alerts, while simultaneously feeding case data back to the cloud for continuous model optimization. Compared to traditional static algorithm tools, this 'learnable platform' model upgrades ultrasound AI from an auxiliary tool to a dynamically evolving digital diagnostic hub.

## Applications

The Ultrasound AI Platform is primarily used for prenatal screening and fetal structural assessment, fetal cardiac abnormality identification, automated cardiac ultrasound measurement, bedside ultrasound-assisted diagnosis in emergency departments, and image standardization in primary healthcare institutions. Typical downstream clients include: Mayo Clinic, Cleveland Clinic, Charit?, Peking Union Medical College Hospital, and National University Hospital.

## Technology Trends

From a technological evolution perspective, ultrasound AI platforms are evolving from 'automatic measurement plug-ins' to 'intelligent imaging decision-making platforms.' Algorithms are no longer limited to structural segmentation and size calculation but have expanded to risk prediction, abnormality probability scoring, and remote quality control systems. The introduction of AI has significantly reduced diagnostic discrepancies among different physicians, especially in prenatal screening, where it is of great value in the early identification of complex fetal cardiac structural abnormalities, improving the success rate of early intervention for congenital diseases in newborns.

## Example

In a bidding project at a large maternity center in France, the hospital introduced the BrightHeart ultrasound AI platform to standardize fetal heart screening procedures. The system automatically identifies the four-chamber view structure and outflow tract using a deep learning model. Without altering existing ultrasound equipment, it was deployed to multiple devices through software licensing, enabling real-time alerts for fetal heart abnormalities. This project emphasizes continuous data updates and cloud-based algorithm upgrades, demonstrating the practical application value of subscription-based medical AI products in public hospitals.

## Market Influencing Factors

The core influencing factor in the Ultrasound AI Platform market does not depend on the speed of individual ultrasound hardware upgrades, but rather on the long-term demand from the healthcare system for standardized and precise diagnostic capabilities. On the one hand, the global increase in birth defect screening and the proportion of older mothers has raised the requirements for automation and consistency in prenatal diagnosis; on the other hand, the expansion of primary healthcare and POCUS scenarios has made AI an important tool for bridging experience gaps. The application of AI in neonatal and fetal prenatal diagnosis has significantly improved the early detection rate of complex structural abnormalities, reduced the risk of misdiagnosis and missed diagnosis, and promoted the transformation of ultrasound examination from experience-dependent to algorithm-supported. Overall, the market exhibits a pattern of 'algorithm-driven + subscription model expansion + platform integration by device manufacturers,' and the essence of competition has shifted from hardware performance competition to system-level competition based on data scale, algorithm validation, and clinical trust.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Ultrasound AI Platform and breaks down the forecast by Deployment Method, 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 Ultrasound AI Platform.

This report presents a comprehensive overview, market shares, and growth opportunities of Ultrasound AI Platform market by product type, application, key players and key regions and countries.

Segmentation by Deployment Method:

Cloud-Based

On-Premise

Hybrid Cloud Architecture

Segmentation by Functional Hierarchy:

Image Enhancement

Automatic Structure Recognition

Automatic Measurement

Anomaly Risk Scoring

Others

Segmentation by Business Model:

Single Device Licensing

SaaS Platform Subscription

Healthcare Group-Level Subscription

Others

Segmentation by Application:

Hospital

Clinic

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 analyzing the company's coverage, product portfolio, its market penetration.

BrightHeart (Private, Paris, France)

Diagnoly (Private, Lyon, France)

Sonio (Public, Paris, France)

Ultrasound AI (Private, Greenwood Village, USA)

SmartAlpha (Private, Cankaya, Turkey)

Caption Health (Public, Brisbane, USA)

Philips (Public, Amsterdam, Netherlands)

RayShape (Private, Shenzhen, China)

Intelligent Ultrasound (Public, London, UK)

Butterfly Network (Public, Burlington, USA)

UltraSight (Private, Cambridge, USA)

Origin Medical (Private, Austin, USA)

Mindray (Public, Shenzhen, China)

GE HealthCare (Public, Chicago, USA)

ThinkSono (Private, London, UK)

DESKi (Private, Bordeaux, France)

Deepecho (Private, Rabat, Morocco)

BabyFlix (Private, San Diego, USA)

BioticsAI (Private, Oakland, USA)

Exo Imaging (Private, Redwood City, USA)

Us2.ai (Private, Singapore, Singapore)

RIVANNA (Private, Charlottesville, USA)

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