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Handheld Ultrasound Market Forecasts to 2032 – Global Analysis By Transducer Type (Linear Array, Endocavity, Curved Array, Phased Array, and Other Scanners), Software & Connectivity, Data Management Features, Technology, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Handheld Ultrasound Market is accounted for $402.00 million in 2025 and is expected to reach $1037.22 million by 2032 growing at a CAGR of 14.5% during the forecast period. A handheld ultrasound is a small, portable imaging tool designed to capture live visuals of organs, tissues, and circulation using sound waves. Unlike conventional ultrasound systems, it is compact, highly mobile, and convenient for use in bedside examinations or field conditions. Offering rapid diagnostic insights, it supports healthcare providers in immediate clinical assessments. Its versatility makes it valuable in emergency medicine, intensive care, and frontline healthcare, improving accessibility to essential diagnostic imaging.

According to data published by the World Health Organization (WHO), there were an estimated 20.0 million new cancer cases globally in 2022.

Market Dynamics:

Driver:

Rising prevalence of chronic diseases

The growing burden of chronic illnesses such as cardiovascular disease, diabetes, and

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cancer is fueling demand for portable diagnostic solutions. Handheld ultrasound devices are increasingly used for point-of-care imaging to support early detection and ongoing monitoring. As global populations age, healthcare systems are shifting toward proactive and personalized care models. These compact imaging tools enable clinicians to perform bedside assessments, reducing the need for costly and time-consuming referrals. Technological advancements in probe miniaturization and AI-powered image interpretation are enhancing diagnostic accuracy. The trend toward decentralized healthcare is accelerating the adoption of handheld ultrasound across hospitals, clinics, and home settings.

Restraint:

Limited image quality and advanced features

Limitations in processing power and transducer capabilities restrict their use in complex diagnostic scenarios. Advanced features like elastography, Doppler imaging, and 3D reconstruction are still underdeveloped in many handheld models. These constraints can hinder clinical decision-making, especially in high-stakes environments like emergency rooms or surgical suites. Manufacturers face challenges in balancing compact design with high-performance imaging. As a result, adoption may be slower in specialties that demand precision and comprehensive visualization.

Opportunity:

Integration with telemedicine and remote patient monitoring

The convergence of handheld ultrasound with telehealth platforms is opening new frontiers in remote diagnostics. Physicians can now guide scans in real-time and interpret images from afar, improving access in underserved regions. Integration with cloud-based systems allows seamless data sharing and longitudinal patient tracking. Emerging trends include AI-assisted image analysis and smartphone-connected probes that enhance usability for non-specialists. These innovations are particularly valuable in home healthcare, rural clinics, and disaster response scenarios. As virtual care becomes mainstream, handheld ultrasound is poised to become a cornerstone of remote patient monitoring ecosystems.

Threat:

Data security and privacy concerns

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The digitization of ultrasound imaging raises significant concerns around patient data protection. Wireless transmission and cloud storage expose sensitive health information to potential breaches. Compliance with regulations such as HIPAA and GDPR requires robust encryption and secure access protocols. Smaller manufacturers may struggle to implement enterprise-grade cybersecurity measures, increasing vulnerability. The integration of AI and IoT further complicates data governance, especially when third-party platforms are involved. Without stringent safeguards, trust in handheld ultrasound technology could be undermined, slowing its adoption in clinical workflows.

Covid-19 Impact:

The COVID-19 pandemic accelerated the use of handheld ultrasound for rapid bedside assessments, especially in respiratory and cardiac evaluations. Hospitals prioritized portable imaging to minimize patient movement and reduce cross-contamination risks. Supply chain disruptions initially hampered device availability, but demand surged as clinicians sought flexible diagnostic tools. Regulatory bodies responded with expedited approvals and emergency use authorizations to support frontline care. The crisis also catalyzed innovation in wireless probes and AI-guided scanning for non-radiologists. Post-pandemic, handheld ultrasound is increasingly viewed as an essential tool for resilient and scalable healthcare delivery.

The linear arraysegment is expected to be the largest during the forecast period

The linear array segment is expected to account for the largest market share during the forecast period, due to its versatility in vascular, musculoskeletal, and superficial organ imaging. These probes offer high-resolution imaging for surface-level diagnostics, making them indispensable in emergency and outpatient settings. Advancements in beamforming and signal processing are improving clarity and diagnostic confidence. Integration with mobile platforms enables real-time sharing and annotation of images. The segment benefits from rising demand in sports medicine, anesthesiology, and trauma care. As clinical applications expand, linear array probes continue to lead in both volume and innovation.

The home healthcare segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the home healthcare segment is predicted to witness the highest growth rate, driven by the shift toward decentralized care. Patients and

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caregivers are increasingly empowered to perform basic scans under remote supervision. Compact, user-friendly devices with AI guidance are making ultrasound accessible beyond clinical environments. The rise of chronic disease management and aging populations is fueling demand for in-home diagnostics. Integration with wearable sensors and telehealth platforms is enhancing continuity of care. As reimbursement models evolve to support remote services, home-based ultrasound is becoming a key enabler of personalized medicine.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, supported by expanding healthcare infrastructure and rising diagnostic demand. Countries like China, India, and Japan are investing in portable imaging to bridge gaps in rural and urban care. Government initiatives promoting digital health and local manufacturing are boosting device penetration. The region is witnessing rapid adoption of AI-enabled ultrasound and smartphone-integrated probes. Strategic collaborations between global OEMs and regional startups are accelerating innovation and affordability. With a growing middle class and increasing healthcare awareness, Asia Pacific remains a powerhouse for handheld ultrasound growth.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, driven by technological leadership and robust R&D investment. The U.S. and Canada are pioneering smart ultrasound systems with AI diagnostics and cloud connectivity. Hospitals are integrating handheld devices into electronic health records and remote care platforms. Regulatory agencies are streamlining approvals for next-gen imaging tools, encouraging rapid commercialization. The region benefits from strong reimbursement policies and high adoption of point-of-care technologies. As precision diagnostics gain momentum, North America continues to set the benchmark for handheld ultrasound innovation.

Key players in the market

Some of the key players in Handheld Ultrasound Market include GE HealthCare Technologies Inc., Healcerion Co., Ltd., Siemens Healthineers AG, EchoNous Inc., Koninklijke Philips N.V., Aco Healthcare Co., Ltd., Canon Medical Systems Corporation, DGH Technology, Inc., FUJIFILM Holdings Corporation, Dawei Group, Mindray Medical International Ltd., BMV AG, Butterfly Network Inc., CHISON Medical Technologies Co.,

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Ltd., and Clarius Mobile Health Corp.

Key Developments:

In September2025, GE HealthCare announced it has entered into an agreement to acquire icometrix, a company focused on providing AI-powered brain imaging analysis for neurological disorders such as Alzheimer's disease to meet the growing demand for MRI in personalized treatment planning.

In September2025, FUJIFILM Biotechnologies announced a significant expansion of its global partnership with argenx SE, a global immunology company. As part of the expanded agreement, FUJIFILM Biotechnologies will initiate manufacturing of argenx' drug substance for efgartigimod at the Holly Springs, North Carolina, site in 2028.

TransducerTypes Covered:

- Linear Array
- Endocavity
- Curved Array
- Phased Array
- Other Scanners

Software &ConnectivitiesCovered:

- Smartphone Application-Based Devices
- Customized Software-Based Scanners
- Bluetooth
- USB Connectivity
- Wi-Fi / Cellular

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Data Management FeaturesCovered:

- Internal Storage
- External Storage
- Cloud / Remote Monitoring

Technologies Covered:

- 2D Ultrasound
- 3D/4D Ultrasound
- Doppler Ultrasound

Applications Covered:

- Obstetrics &Gynecology (OBGY)
- Urology
- Cardiology
- Pulmonary
- Vascular Imaging
- Emergency Medicine
- Abdominal Imaging
- Musculoskeletal (MSK)
- Other Applications

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End Users Covered:

- Hospitals
- Diagnostic Imaging Centers
- Home Healthcare
- Ambulatory Surgical Centers (ASCs)
- Specialty Clinics
- Maternity Clinics
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain

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- Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific
- South America
  - Argentina
  - Brazil
  - Chile
  - Rest of South America
- Middle East & Africa
  - Saudi Arabia
  - UAE
  - Qatar
  - South Africa
  - Rest of Middle East & Africa

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What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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