

# **Ultrasound Systems Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Technology (Diagnostic Ultrasound {2D Ultrasound, 3D & 4D Ultrasound, Doppler Ultrasound}, Therapeutic Ultrasound {High-Intensity Focused Ultrasound (HIFU) and Extracorporeal Shockwave Lithotripsy), By Display Type (Colored and Black & White), By Mobility (Mobile and Fixed), By Application (Obstetrics/Gynecology, General Imaging, Cardiology, Urology), By End User (Hospitals & Clinics, Diagnostic Centers, Others), By Region and Competition**

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## **Abstracts**

Global Ultrasound Systems Market has valued at USD 11.86 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.67% through 2028. An ultrasound scan, also known as sonography, is a medical procedure that utilizes high-frequency sound waves to generate real-time images of the body's internal structures. It is a valuable diagnostic tool for medical professionals in identifying and evaluating conditions affecting various organs and systems, such as the bladder, eyes, gallbladder, kidneys, liver, ovaries, pancreas, spleen, thyroid, testicles, uterus, and blood vessels, without the need for surgical intervention. Additionally, it plays a crucial role in monitoring the development of a fetus during pregnancy, as ultrasound imaging does not involve the use of radiation, distinguishing it from other imaging techniques. Moreover, this technique is employed to assist in guiding needle-based

procedures like biopsies or tumor treatments, examining breast abnormalities, assessing thyroid gland function, detecting genital and prostate issues, as well as evaluating metabolic bone diseases.

## Key Market Drivers

### High Prevalence of Chronic Diseases

The frequency of chronic diseases is on a rapid rise, leading to a surge in demand for healthcare services. This includes an increase in patient visits, hospital admissions, and surgeries. In fact, according to the CDC's statistics from 2022, there were more than 900 million doctor visits, 155 million visits to the ER, and 45 million outpatient procedures performed in the United States alone. This escalating demand has also resulted in a significant increase in the need for medical imaging equipment, particularly ultrasound systems, which play a crucial role in the diagnosis and treatment of various conditions. Additionally, the growing proportion of geriatric populations worldwide who suffer from chronic diseases has further contributed to the demand for these devices.

Over the past decade, the applications of ultrasound technology have expanded beyond its traditional use in obstetrics, cardiology, obesity, and radiography. It is now widely used in clinical areas such as surgery, gastroenterology, and musculoskeletal. This expansion has been driven by recent innovations and the introduction of numerous products in the point-of-care (POC) sector, including handheld devices. As a result, the deployment of ultrasound systems in primary care, anesthesia, emergency medicine, and critical care applications has significantly increased. All these factors are expected to fuel the growth in sales of medical imaging equipment, particularly ultrasound systems, throughout the forecast period. The continuous advancements in technology and the increasing prevalence of chronic diseases worldwide are driving the need for more comprehensive and advanced healthcare solutions.

### Rising Prevalence of Orthopedic Injuries and Musculoskeletal Disorders

Musculoskeletal disorders are associated with both occupational injuries and age-related dysfunction. Common musculoskeletal conditions include rheumatoid arthritis, osteoarthritis, osteoporosis, and septic arthritis. Among the elderly population, orthopedic injuries such as bone fractures and broken hips are prevalent.

On a global scale, numerous individuals experience musculoskeletal conditions. For example, according to the World Health Organization (WHO) 2021 report,

approximately 1.71 billion people worldwide are affected by musculoskeletal conditions. Furthermore, the WHO predicts an increase in disabilities related to musculoskeletal disorders in the coming decades. Moreover, the aging population often encounters age-related issues such as joint pain, arthritis, and osteoporosis. Arthritis, in particular, is widespread among adults, impacting millions of individuals worldwide. According to the CDC, approximately 63.0 million people in the U.S. were diagnosed with arthritis in 2020, with projections indicating that this number could reach 78.4 million by 2040. These orthopedic conditions have led to an increased demand for ultrasound systems to analyze and diagnose these disorders.

### Increasing Aging Population

The aging population and shifts in societal behaviors are significant factors contributing to a consistent rise in the prevalence of chronic diseases. This has resulted in an increased demand for ultrasound procedures. According to the 'World Population Ageing 2020' report published by the Department of Economic and Social Affairs, United Nations, the global population of individuals aged 65 or above was 727 million in 2020 and is projected to reach 1.5 billion by 2050.

Moreover, knee pain, often associated with knee osteoarthritis, is highly prevalent among the elderly population and can be diagnosed using ultrasound. Additionally, lung cancer ranks among the most widespread chronic illnesses. GLOBOCAN estimates that lung cancer cases will increase from 2.21 million in 2020 to approximately 3.63 million in 2030.

In addition to chronic diseases, malnutrition poses a significant risk to the elderly population, leading to increased frailty, reduced quality of life, and higher mortality rates. Malnutrition often results in a decrease in muscle mass, which affects muscle strength. Researchers have explored the use of ultrasonography to measure muscle thickness as a nutritional assessment tool in older adults. Consequently, the rising prevalence of chronic diseases and the growing geriatric population are expected to drive the adoption of ultrasound systems, thereby fueling the growth of this market.

### Introduction To Artificial Intelligence In Obstetrics And Gynecology Ultrasound Imaging

Artificial intelligence (AI) utilizes data and algorithms to achieve the same, if not superior, outcomes as humans. AI powers various applications like face identification, speech recognition in virtual assistants (such as Amazon Alexa, Apple's Siri, Google Assistant, and Microsoft Cortana), as well as self-driving automobiles. Notably, AI

software has recently triumphed in world championships in chess, go, and poker.

Within the healthcare sector, AI plays a pivotal role in driving innovation. It aids in the development of new medications, offers clinical decision support, and ensures quality assurance in radiography. The list of AI applications in medical image analysis, regulated by the FDA or European Union (soon to be governed by the European Union Medical Device Regulation (EU MDR)), is rapidly expanding. These applications address a wide range of clinical needs, including arrhythmia detection using smartwatches or fully automated triage of critical imaging techniques for radiologists.

Deep learning, a significant AI technology, excels in pattern identification from photographs, making it invaluable to professionals who heavily rely on image analysis, such as radiologists, sociologists, and pathologists. While obstetric and gynecologic ultrasonography are among the most commonly performed imaging tests, AI's impact in this domain has been limited thus far. Nevertheless, there is immense potential for AI to assist with repetitive ultrasound tasks, such as automatically selecting high-quality acquisitions and providing instant quality assurance. Realizing this potential requires interdisciplinary collaboration between AI developers and ultrasound specialists.

## Key Market Challenges

### Product Recalls

The market is currently experiencing a remarkable surge in growth, driven by groundbreaking advancements in the field of artificial imaging. However, this rapid progress has not been without its challenges. Recent recalls of certain ultrasound equipment have unfortunately tarnished the reputation of major businesses operating in this sector. One such example is the class 2 product recall issued by the U.S. FDA in May 2022 for Koninklijke Philips N.V.'s S83t compact. The recall was prompted by a defect in the transesophageal transducer's auto cool feature, which posed a potential risk of patient harm during ultrasound exams. These recalls highlight the importance of maintaining strict quality control measures and continuously innovating to ensure the safety and reliability of medical imaging technologies.

### Lack Of Skilled Technicians

There is a concerning lack of trained technicians in nations like Australia, the United Kingdom, and Canada. This shortage of skilled professionals has had a significant impact on the healthcare industry, particularly in the field of sonography. For instance,

according to several studies, the U.K.'s sonographer vacancy rate is estimated to be between 12 and 18%. This shortage not only affects the quality of healthcare services but also creates challenges for healthcare institutions in providing timely and accurate diagnoses. The inability to locate qualified applicants is one of the major causes contributing to this issue. Addressing this shortage and investing in training programs and recruitment efforts is crucial to meet the growing demand for sonographers and ensure the delivery of high-quality healthcare services.

## Key Market Trends

### Integration of Artificial intelligence

The market is on the cusp of witnessing significant growth as artificial intelligence (AI) continues to seamlessly integrate into healthcare systems. With its remarkable ability to automate time-consuming tasks such as quantification and selecting optimal image slices from vast 3-D collections, AI has emerged as a pivotal component in many cutting-edge ultrasound systems. Looking ahead, experts anticipate AI to become even more prevalent in future ultrasound systems, driving their growth during the forecast period. These advancements in AI technology are truly revolutionizing the field of ultrasound, leading to more efficient and accurate diagnoses, and ultimately enhancing the overall quality of patient care. By harnessing the power of AI, healthcare professionals are empowered to deliver precise and personalized treatment plans, resulting in improved patient outcomes and a brighter future for medical imaging.

### Growing Demand for Portable Ultrasound systems

Portable ultrasound systems are poised to revolutionize the healthcare landscape, significantly boosting the demand for ultrasound technology in the future. These compact and handheld devices represent a paradigm shift in medical diagnostics, offering a multitude of benefits that cater to the evolving needs of healthcare professionals and patients alike.

Portable ultrasound systems are more cost-effective than their larger, traditional counterparts. Their affordability allows healthcare facilities of all sizes and budgets to incorporate ultrasound imaging into their standard protocols, democratizing access to high-quality diagnostics. This democratization, in turn, not only drives up demand for the devices but also leads to earlier and more accurate diagnoses, ultimately improving patient outcomes. Portable ultrasound systems are poised to transform the healthcare landscape by enhancing accessibility, affordability, and usability. As these devices

become more widespread, we can expect a significant increase in demand for ultrasound technology, ushering in a new era of precision medicine and improved patient care.

## Segmental Insights

### Application Insights

The general imaging segment dominated the market in 2022, holding the largest revenue share. It offers a cost-effective solution and encompasses a wide range of scans essential for clinicians to diagnose and treat various conditions, including abdominal, musculoskeletal, small parts, urology, liver, thyroid, scrotum, bladder, pancreas, kidneys, spleen, and gallbladder.

The cardiology segment is projected to exhibit a steady CAGR during the forecast period, driven by the rising prevalence of Cardiovascular Disorders (CVD) globally. According to the World Health Organization (WHO), CVDs are the leading cause of death worldwide, resulting in 17.9 million deaths annually. Furthermore, advancements in ultrasound technology for cardiac applications are expected to fuel market growth. For instance, in August 2020, Philips expanded its cardiovascular ultrasound portfolio with the launch of Affiniti CVx. This system is designed to enhance cardiology departments' capabilities, enabling improved patient care, efficiency, and throughput.

### End User Insights

Based on the end-user segment, the hospitals and clinics segment has been the dominant force in the market and held the largest revenue share in 2022. It is expected to maintain its lead over the forecast period. The growth of this segment can be attributed to the extensive use of ultrasound systems in hospital settings and the increasing number of patients with lifestyle-related disorders. The introduction of portable systems is expected to further drive the demand for ultrasound systems in both outpatient and inpatient departments.

Moreover, the adoption of technologically advanced imaging systems and the increasing number of mergers and acquisitions between hospitals and market players are anticipated to bolster the demand for new installations in the coming years. For instance, in 2020, Philips signed a multi-year contract to support the expansion and improvement of Zhejiang University's First Affiliated Hospital, one of China's leading hospitals. This contract includes Ultrasound, Image-Guided Therapy, Monitoring



Analytics, and Therapeutic Care systems, which integrate clinical research and education.

## Regional Insights

In 2022, the North American countries emerged as dominant players in this industry, generating the highest revenue. The region is expected to witness significant growth during the forecast period. One of the key factors driving the regional market is the presence of a substantial number of potential competitors, along with the increasing incidence of cancer cases. With the growing demand for advanced imaging equipment, the Asia Pacific market is projected to grow at a steady CAGR. Market players in the region are also implementing various strategies to establish their position.

For instance, in June 2020, Philips obtained approval from the Japanese healthcare authority to unveil its selection of portable ultrasound systems. The Southeast Asian countries, including Japan, China, and India, with rapidly expanding economies and superior healthcare systems, are expected to be the primary growth drivers in the region.

## Key Market Players

Koninklijke Philips N.V.

Hitachi Ltd.

GE Healthcare Inc.

Neusoft Corporation

Siemens Healthineers AG

Chison Medical technologies co. Ltd.

Canon Medical Systems

Mindray Medical International Limited

Samsung Medison Co., Ltd.

Shantou Institute of ultrasound instruments Inc.

Report Scope:

In this report, the Global Ultrasound Systems Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Ultrasound Systems Market, By Technology:

Diagnostic Ultrasound

Therapeutic Ultrasound

Ultrasound Systems Market, By Display Type:

Coloured

Black & White

Ultrasound Systems Market, By Mobility:

Mobile

Fixed

Ultrasound Systems Market, By Application:

Obstetrics/Gynaecology

General Imaging

Cardiology

Urology

Ultrasound Systems Market, By End User:

Hospital & Clinic



Home Care

Ambulatory Surgical Centre

Ultrasound Systems Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Ultrasound Systems Market.

## Available Customizations:

Global Ultrasound Systems market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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