

Ultrasound AI Market Size, Share and Growth Outlook 2026: By Component (Software, Hardware, Services), By Technology, By Device Type, By Imaging Mode, By Application, By End-User, Companies to 2034.

<https://marketpublishers.com/r/U17967C94699EN.html>

Date: July 2026

Pages: 190

Price: US\$ 3,482.00 (Single User License)

ID: U17967C94699EN

Abstracts

The global Ultrasound AI Market size is forecast to increase from \$2.36 Billion in 2026 to \$13.08 Billion in 2034 at a CAGR of 23.87% between 2026 and 2034.

The Ultrasound AI market report provides detailed analysis and outlook of Ultrasound AI segments including By Component (Software, Hardware, Services), By Technology (Machine Learning, Deep Learning, Computer Vision, Natural Language Processing (NLP)), By Device Type (Cart / Trolley-based, Compact / Laptop, Handheld / Probe-based), By Imaging Mode (2D Ultrasound, Doppler and Color Flow Imaging, 3D / 4D and Volumetric Imaging), By Application (Cardiology / Echocardiography, Radiology, Obstetrics and Gynecology, Gastroenterology / Hepatology, Musculoskeletal and Sports Medicine, Oncology), By End-User (Hospitals, Diagnostic Imaging Centers, Ambulatory and Physician Clinics, Point-of-Care (POC) Settings) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Ultrasound AI Industry Overview

Artificial Intelligence Is Transforming Ultrasound Imaging and Clinical Decision-Making

The global ultrasound AI industry is experiencing rapid growth as artificial intelligence becomes increasingly integrated into diagnostic imaging workflows to improve examination quality, workflow efficiency, and diagnostic consistency. Healthcare providers are adopting AI-enabled ultrasound systems that automate image acquisition,

optimize scanning protocols, and assist clinicians with real-time measurements and anatomical recognition. These capabilities reduce operator dependency, shorten examination times, and support standardized imaging across diverse patient populations and clinical settings. As demand grows for faster and more accurate diagnostic imaging, manufacturers continue embedding deep learning algorithms into premium ultrasound platforms to enhance productivity and clinical confidence.

AI-Powered Ultrasound Platforms Are Enhancing Examination Efficiency

Leading imaging manufacturers continue introducing intelligent ultrasound systems that simplify routine examinations while improving diagnostic consistency. Canon Medical Systems launched the Aplio me X ultrasound platform featuring the Altivity AI platform, providing AI-assisted workflows that streamline routine imaging while supporting up to four hours of battery-powered operation across diverse clinical environments. FUJIFILM Healthcare Europe expanded its portfolio with the ARIETTA® DeepInsight x ultrasound systems, incorporating proprietary Deep Learning AI technologies such as iRecognize, which automatically selects body marks, identifies appropriate probes, and optimizes image quality to deliver consistent clinical performance across different users and patient body types. These innovations demonstrate the industry's commitment to intelligent workflow automation and standardized imaging quality.

Workflow Automation Continues to Improve Diagnostic Productivity

Artificial intelligence is increasingly supporting clinicians by automating repetitive imaging tasks and improving measurement accuracy during routine examinations. Philips received FDA 510(k) clearance for its Elevate Plus AI-powered workflow automation software, integrated into the Epiq Elite and Affiniti ultrasound systems. The platform enhances scanning efficiency, reduces inter-operator variability, and automatically performs complex diagnostic measurements, allowing clinicians to focus on interpretation and patient care rather than manual image processing. These advancements reinforce the industry's broader transition toward AI-driven ultrasound ecosystems that improve productivity, support standardized diagnostics, and enable more efficient delivery of high-quality imaging services.

Ultrasound AI Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Ultrasound AI market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare

infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- GE HealthCare Technologies Inc., Koninklijke Philips N.V., Siemens Healthineers AG, Canon Medical Systems Corporation, Fujifilm Holdings Corporation, NVIDIA Corporation, Shenzhen Mindray Bio-Medical Electronics Co., Ltd., Esaote S.p.A., Sonio SAS, EchoNous, Inc.. The Ultrasound AI market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Ultrasound AI industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Ultrasound AI Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Ultrasound AI companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Ultrasound AI markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and long-term outlook

- Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Ultrasound AI Market Competitive Benchmarking and Company Analysis

Leading companies in Ultrasound AI industry include- GE HealthCare Technologies Inc., Koninklijke Philips N.V., Siemens Healthineers AG, Canon Medical Systems

Corporation, Fujifilm Holdings Corporation, NVIDIA Corporation, Shenzhen Mindray Bio-Medical Electronics Co., Ltd., Esaote S.p.A., Sonio SAS, EchoNous, Inc.. The Ultrasound AI market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Ultrasound AI Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Ultrasound AI market remains one of the strongest-performing segments in the country.

The US Ultrasound AI Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Ultrasound AI market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Ultrasound AI industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Ultrasound AI markets

Canada's strong Ultrasound AI sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian

Ultrasound AI market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Ultrasound AI Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Ultrasound AI market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Ultrasound AI population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Ultrasound AI industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Ultrasound AI market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Ultrasound AI sales through 2034

France Ultrasound AI companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the

end of the Second World War.

UK Ultrasound AI Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Ultrasound AI distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or £280 billion in 2025.

According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was £49 billion (14.1%) and voluntary health insurance was £9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Ultrasound AI Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Ultrasound AI market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Ultrasound AI industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Ultrasound AI industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Ultrasound AI Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Ultrasound AI market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Ultrasound AI market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Ultrasound AI Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Ultrasound AI Market Segmentation

By Component

Software

Hardware

Services

By Technology

Machine Learning

Deep Learning

Computer Vision

Natural Language Processing (NLP)

By Device Type

Cart / Trolley-based

Compact / Laptop

Handheld / Probe-based

By Imaging Mode

2D Ultrasound

Doppler and Color Flow Imaging

3D / 4D and Volumetric Imaging

By Application

Cardiology / Echocardiography

Radiology

Obstetrics and Gynecology

Gastroenterology / Hepatology

Musculoskeletal and Sports Medicine

Oncology

By End-User

Hospitals

Diagnostic Imaging Centers

Ambulatory and Physician Clinics

Point-of-Care (POC) Settings

Leading Companies in Ultrasound AI Industry (2026)

GE HealthCare Technologies Inc.

Koninklijke Philips N.V.

Siemens Healthineers AG

Canon Medical Systems Corporation

Fujifilm Holdings Corporation

NVIDIA Corporation

Shenzhen Mindray Bio-Medical Electronics Co., Ltd.

Esaote S.p.A.

Sonio SAS

EchoNous, Inc.

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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By Technology
Machine Learning
Deep Learning
Computer Vision
Natural Language Processing (NLP)
By Device Type
Cart / Trolley-based
Compact / Laptop
Handheld / Probe-based
By Imaging Mode

2D ULTRASOUND

Doppler and Color Flow Imaging

3D / 4D AND VOLUMETRIC IMAGING

By Application
Cardiology / Echocardiography
Radiology
Obstetrics and Gynecology
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