

Brazil Ultrasound Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Brazil Ultrasound Devices Market is expected to register a CAGR of 5.96% during the forecast period.

The COVID-19 pandemic initially impacted the Brazil ultrasound devices market, with the decrease in the volume of ultrasound diagnoses that use ultrasound devices. For instance, according to a study published in the Health Policy and Technology in March 2023, the COVID-19 pandemic disrupted the diagnostic imaging examinations, including ultrasonography, in the Brazilian unified healthcare system. Although, in the post-pandemic period, the number of COVID-19 patients decreased in Brazil, which led to the resumption of the ultrasound diagnosis of non-COVID and non-urgent medical cases. Thus, the pandemic had a slight negative impact on the Brazil ultrasound devices market initially. However, the resumption of ultrasound diagnosis for other diseases enabled the market to grow at a normal pace with the increasing demand for ultrasound devices in Brazil.

The market is expected to grow with the increasing incidence of chronic diseases, improving healthcare infrastructure and programs. The country has a rising burden of chronic diseases, which is expected to create a higher demand for ultrasound devices to diagnose highly prevalent chronic diseases. For instance, according to a study published in Diabetology & Metabolic Syndrome in January 2022, one in every two one in two adults with Type 2 diabetes is associated with cardiovascular disease in Brazil. Also, as per the same source, the prevalence of all CVD subtypes was high in adults having the two diabetes-affected adults, except for carotid artery disease. Further, as per the data published by the International Agency for Research on Cancer (IARC) in 2023, the new cancer cases in Brazil are expected to increase in the coming years, with over 687 thousand cancer cases by 2025 to about 787 thousand cases by 2030. Thus, with such a high prevalence of chronic diseases, the demand for ultrasound devices will increase for the sonographic examination of these diseases, which will boost the market's growth in the coming years.

Furthermore, improving healthcare infrastructure and healthcare programs will increase the rate of diagnosis of patients, which

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will increase the volume of ultrasonography examinations in the country and bolster the demand for ultrasound devices in Brazil. For instance, in March 2023, Brazil's federal government launched its new Mais Medicos para o Brazil program, which will offer over 15,000 new vacancies in 2023, preferably to Brazilian physicians trained in Brazil, with the investment of BRL 712 million (USD 150.5 million) in 2023. Further, in October 2022, Rio de Janeiro launched a public consultation for a public-private partnership project to expand the Souza Aguiar hospital, with an investment of BRL 746 million reais (USD 145 million) in Brazil.

Therefore, owing to the rising burden of chronic diseases and the technological advancements in ultrasound devices, the studied market is anticipated to grow over the analysis period. However, strict regulations are likely to impede the market growth.

Brazil Ultrasound Devices Market Trends

The Radiology Segment is Expected to Witness Significant Growth Over the Forecast Period

Interventional radiology (IR) can be defined as a medical subspecialty that performs various minimally invasive procedures using medical imaging guidance.

The ultrasound market for radiology applications in Brazil is expected to grow owing to the factors such as the rising number of interventional neurological procedures, genitourinary interventional procedures, and a growing number of cancer procedures.

The country has witnessed an increase in the number of cancer and neurological diseases, which is expected to elevate the demand for ultrasound imaging and boost the segment's growth. For instance, as per the data published by the International Agency for Research on Cancer (IARC) in 2023, in Brazil, the number of brain and nervous system cancer cases is estimated to reach 13.9 thousand by the year 2025, and it is expected to increase further to 15.5 thousand by 2030. Such a high number indicates that the demand for ultrasound systems in radiology departments will increase with the growing burden of cancer. In addition, as per the data published by the Organization for Economic Cooperation and Development (OECD) in 2021, over 9.6 individuals in every 1,000 people in Brazil were reported to have dementia in 2021. The same source stated that this number is expected to increase to 27.7 individuals in every 1,000 people in Brazil by 2050. Such a vast patient base of dementia in Brazil is expected to increase the demand for ultrasound devices for diagnosis and conduct more research studies to understand better disease development, which is expected to drive the segment's growth.

Moreover, the country offers opportunities for expansion to market players, likely increasing the market penetration in Brazil, thereby fueling the segment's growth. For instance, in February 2021, Insightec received market approval from the Brazilian Health Regulatory Agency, ANVISA (Agencia Nacional de Vigilancia Sanitaria), and partnered with Strattner to bring Focused Ultrasound to the Brazilian market.

Therefore, the radiology segment is expected to witness significant growth over the forecast period due to the abovementioned factors, including the high burden of cancer, dementia, and the recent development by the market players.

The 3D and 4D Ultrasound Imaging segment is Expected to Witness Significant Growth Over the Forecast Period

The segment includes three and four dimensions ultrasound imaging, mainly visualizing fetal structures and internal anatomy. The 4D ultrasounds enable live-streaming video of the images, offering the visualization of the motion of the fetal heart valves and walls and the current blood through various vessels.

The segment is expected to grow with advancing 3D and 4D ultrasound imaging research. Several studies performed by Brazilian researchers have underlined the emerging use of 3D and 4D ultrasound imaging, which has shown efficacy in diagnosing and visualizing the target organs. For instance, a study published in Obstetrics & Gynecology Science in May 2021 highlighted the

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effectiveness of 3D ultrasound for detecting fetal cardiac diseases and cardiac myopathies. The study stated that 3D ultrasound was used along with the advanced technology of the spatiotemporal image correlation and virtual organ computer-aided analysis, which detected the changes in the interventricular septum volume of fetuses in the pre-gestational and healthy mothers. The study further emphasized that 3D ultrasound imaging can timely diagnose fetal anomalies found in diabetic mothers, including conotruncal anomalies, ventricular septal defects, hypertrophic cardiomyopathy, and other cardiac malformations. Thus, with such research, the demand for 3D ultrasound is expected to increase for fetal diagnosis and will likely boost the segment's growth.

Further, a study published in the journal PAIN Reports in January 2021 mentioned using 4D ultrasound imaging to assess pain using facial expressions in the human fetus. The study stated that such pain assessment could reveal the implications in postoperative pain management after intrauterine surgical interventions. Such research is expected to improve intrauterine surgical interventions' safety by reducing fetus pain. Thus, these findings are expected to attract more research and developments in 4D ultrasound imaging, which is anticipated to boost the segment's growth.

Therefore, the 3D and 4D ultrasound segment is expected to grow significantly over the forecast period due to the advancing research in 3D and 4D ultrasound imaging.

Brazil Ultrasound Devices Industry Overview

The Brazil ultrasound devices market is consolidated with a few market players. The key players operating in the market include, Siemens Healthineers AG, Koninklijke Philips NV, GE Healthcare, Canon Medical Systems Corporation, and Fujifilm Holdings Corporation.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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