

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

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Report description:

The Germany Ultrasound Devices Market size is estimated at USD 539.07 million in 2025, and is expected to reach USD 711.25 million by 2030, at a CAGR of 5.7% during the forecast period (2025-2030).

The COVID-19 pandemic significantly impacted the ultrasound devices market in Germany, as various departments, such as radiology and obstetrics, were severely affected during the pandemic. For instance, according to an article published by Rapid Communication in December 2021, the COVID-19 pandemic expectedly impacted ultrasound services in Germany during the initial pandemic phase as it involved direct contact with the patient. Thus, such factors affected the growth of the studied market during the pandemic. However, as the pandemic has subsided, the German ultrasound devices market is expected to grow steadily during the forecast period.

Ultrasound devices are majorly used in imaging procedures to diagnose various diseases; thus, the rising prevalence of chronic illnesses like cardiovascular diseases and cancer is anticipated to boost the growth of the ultrasound device market in Germany throughout the study's projected period. For instance, according to an article published by the WifOR Institute in February 2022, cardiovascular diseases (CVDs) are said to be widely prevalent in Germany. They are additionally one of the most common causes of mortality.

Moreover, according to an article published by SpringerLink in September 2022, Germany has a high burden of coronary heart disease, obesity, high blood pressure, and high lipid and glucose levels are considered significant risk factors for developing secondary coronary heart disease in Germany. Thus, the high prevalence of such chronic diseases in the country is expected to boost the growth of the studied market, as ultrasound devices are used for diagnosing these diseases.

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Ultrasound devices are widely used in hospitals and other gynecology centers for the prenatal monitoring of unborn babies, which is also expected to significantly impact the market growth as ultrasound procedures are usually performed 2-3 times during pregnancy. For instance, according to the data updated by Destatis in August 2022, an estimated 795.5 thousand live births took place in Germany in 2021. Thus, the large number of births in Germany is expected to increase the usage of ultrasound devices.

Additionally, the rising developments by market players, such as product launches, mergers, and acquisitions, are also expected to bolster market growth, as these are expected to increase access to advanced products. For instance, in November 2021, Siemens Healthineers, a German company, introduced a new liver analysis feature with the ACUSON Sequoia ultrasound system. It provides clinicians with a new measurement tool called ultrasound-derived fat fraction (UDFF), which helps them evaluate the severity of hepatic steatosis overall.

The system also includes Auto Point Shear Wave Elastography (Auto pSWE), a brand-new method for quantifying liver stiffness that aims to shorten the duration of the liver elastography exam. Thus, the introduction of such devices is expected to increase the demand for ultrasound devices in the country, hence driving market growth.

Thus, the factors such as the rising prevalence of chronic diseases and the increasing developments by market players and other organizations are expected to boost the market growth during the forecast period. However, stringent regulations are expected to hinder market growth.

Germany Ultrasound Devices Market Trends

By Technology, High-intensity Focused Ultrasound Segment is Expected to Hold a Significant Market Share Over the Forecast Period

Focused ultrasonic energy is a non-invasive method for tissue ablation, and it can be used to treat a variety of solid tumors. High-intensity focused ultrasound is utilized more frequently to treat primary and metastatic tumors because it can accurately identify tumors for ablation. Factors such as increasing cancer prevalence and initiatives by key players are expected to boost market growth.

For instance, according to the data published by Destatis in 2023, cancer was the fourth most frequent reason for treatment in Germany in 2021, accounting for 8% of all hospital stays. The source also stated that an estimated 1.44 million patients were treated for cancer in hospitals on an in-patient basis in Germany in 2021. Thus, the country's high cancer burden is expected to increase the usage of high-intensity focused ultrasound systems. Moreover, as cancer is often associated with older adults, the rising population in the country is also expected to enhance segment growth.

Moreover, according to an article published by PubMed in June 2022, a study in Germany showed that high-intensity focused ultrasound (HIFU) had high efficiency in treating benign thyroid nodules. This will result in a rise in the usage of HIFU systems in the German healthcare system for the radiation treatment of prostate cancer and other conditions, which is anticipated to fuel the expansion of high-intensity focused ultrasound systems there.

Hence, the factors mentioned above, such as the high burden of cancer, the growing geriatric population, and the increasing efficiency of high-intensity focused ultrasound systems, are expected to boost segment growth in the country.

By Application, Cardiology Segment is Expected to Hold a Significant Share in the Market Over the Forecast Period

Cardiovascular diseases such as heart failure, cardiac murmur, ischemic heart disease, and acute pulmonary artery thromboembolism are often diagnosed by ultrasound devices. The increasing prevalence of such diseases in Germany and the

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rising geriatric population in the country is expected to boost the segment growth.

For instance, according to an article published by the Thoracic and Cardiovascular Surgeon in June 2022, an estimated 92,838 heart surgery procedures were conducted in Germany in 2021. Thus, the country's large number of cardiovascular surgeries is expected to increase segment growth, as doctors often use ultrasound imaging before any cardiovascular procedure to diagnose the disease properly.

Moreover, the country's high percentage of the geriatric population is also expected to boost market growth as cardiovascular diseases are often associated with older people. For instance, according to the United Nations World Population Prospects data in 2022, an estimated 18.5 million people in Germany was 65 years or older in 2022.

Thus, the factors mentioned above, such as the high prevalence of cardiovascular diseases in Germany and the rising geriatric population, are expected to enhance segment growth.

Germany Ultrasound Devices Industry Overview

Germany ultrasound devices market is moderately competitive and consists of several major players. Some of the key companies in the market are Canon Medical Systems Corporation, GE Healthcare, Fujifilm Holdings Corporation, Siemens Healthineers AG, and Koninklijke Philips NV, among others.

Additional Benefits:

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

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