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

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Report description:

The South Africa Ultrasound Devices Market is expected to register a CAGR of 4.55% during the forecast period.

The COVID-19 pandemic had a slight impact on the South Africa ultrasound devices market initially, with a decrease in the number of ultrasound diagnoses due to the massive influx of COVID-19 patients. However, during the pandemic, the ultrasound imaging of the chest of COVID-19 patients increased, which boosted the demand for ultrasound. For instance, a study published in the Southern African Journal of Infectious Diseases in August 2022 stated that ultrasound chest imaging was carried out in South Africa to document and analyze the chest imaging features in a human immunodeficiency virus (HIV) and tuberculosis (TB) endemic region amid the multiple waves of COVID-19. Also, in the post-pandemic period, the number of COVID-19 patients decreased in South Africa, which led to the resumption of ultrasound imaging for non-COVID and non-urgent medical cases. Thus, the pandemic had a slight negative impact on the South Africa ultrasound devices market initially. However, the resumption of ultrasound diagnosis for other diseases and infections enabled the South Africa ultrasound devices market to grow at a normal pace leading to the increasing demand for ultrasound devices.

The market is expected to grow with the increasing incidences of chronic diseases and improving healthcare infrastructure in the country. South Africa has a growing burden of chronic diseases, including musculoskeletal disorders, cancer, kidney stones, and others, which is expected to increase the demand for ultrasound devices to diagnose these chronic diseases. For instance, the data published by the University of Cape Town (UCT) and the University of the Witwaters in August 2022 stated that cancer incidence is expected to rise to 121 thousand by 2030 in South Africa. The same source also stated that the incidence of breast, prostate, lung, cervical, pediatric, and hematological cancers is expected to increase in South Africa and continue to grow over the next decade. Similarly, according to the data published by the Organization for Economic Cooperation and Development (OECD) in 2021, over 2.6 individuals in every 1,000 people in South Africa had Dementia in 2021. The same source stated that this number

is expected to increase to 4.9 individuals in every 1,000 people in South Africa by 2050. Hence, such a vast patient base of chronic diseases in South Africa is expected to increase the demand for ultrasound devices for disease diagnosis, which is expected to drive the market's growth.

Furthermore, the technological advancements in ultrasound devices will likely accelerate the diagnosis of various medical conditions and adoption of these devices, which will contribute to the country's market growth. For instance, a study published in the journal eBiomedicine Lancet by South African researchers in July 2022 mentioned building collaborative standardized image banks to support point-of-care sputum-free ultrasound tuberculosis detection. The study highlighted the use of lung ultrasound imaging with computer-assisted diagnostics (CAD) for the early detection of tuberculosis. Further, a study published in the Nature Partner Journal Digital Medicine by South African researchers in March 2023 underlined the efficacy of machine learning for the accurate estimation of fetal gestational age based on ultrasound images. The study stated that the machine-learning-based model used for the estimation of the gestational age had the mean absolute error of 3.0 and 4.3 days, which outperformed the current ultrasound-based clinical biometry at these gestational ages. Thus, such high efficacy and accuracy of ultrasound imaging, when integrated with the smart technologies of CAD and machine learning, are expected to attract more market players to leverage their ultrasound devices and offer more advanced features to tap the unmet needs of the patients.

Therefore, owing to the aforementioned factors, including the rising burden of chronic diseases and the technological advancements in ultrasound devices, the studied market is anticipated to witness growth over the analysis period. However, a lack of skilled professionals is likely to impede the market growth.

South Africa Ultrasound Devices Market Trends

3D and 4D Ultrasound Imaging segment is Expected to Hold a Significant Market Share Over the Forecast Period

The segment includes ultrasound imaging with three dimensions and four dimensions. 3D ultrasound imaging consists of taking several 2D ultrasounds from various angles and pieced together to form a three-dimensional image. In 4D ultrasound imaging, 3D ultrasound imaging is developed with time to produce a live-streaming video of the images. The 4D ultrasounds enable live-streaming video of the images, offering the visualization of the motion of the fetal heart valves and walls, as well as the current blood through various vessels.

Several studies performed by South African researchers have highlighted the emerging use of 3D and 4D ultrasound imaging, which has demonstrated the emerging use of 3D and 4D ultrasound and their efficacy and safety for the diagnosis and visualization of the fetus and monitoring of the pregnancy. The rising use of 3D and 4D ultrasound imaging of fetuses will increase the demand for 3D and 4D ultrasound devices, which will bolster the segment's growth in the coming years. For instance, a study published in the Journal of Maternal-Fetal & Neonatal Medicine in January 2022 demonstrated the use of 3D ultrasound volumes to establish reference standards for 23 facial measurements during pregnancy to analyze the fetal alcohol spectrum disorder, which is a biomarker of dysmorphic facial features in the fetus. Thus, such studies highlight the potential use of 3D ultrasound for diagnosing fetal diseases, which can be prevented early, and it is expected to tap more patient base and boost the segment's growth.

Furthermore, the key developments by the market players are expected to increase the adoption of 3D and 4D ultrasound devices in the coming years and boost the segment's growth with more demands. For instance, in March 2022, Butterfly Network, Inc. received a grant of USD 5 million from the Bill & Melinda Gates Foundation to improve maternal and fetal health by providing its portable 3D ultrasound devices to over 1,000 medical workers in Sub-Saharan Africa. The device is the only handheld and whole-body point-of-care ultrasound probe in the world.

Therefore, the 3D and 4D ultrasound segment is expected to witness significant growth over the forecast period due to the

advancing research in 3D and 4D ultrasound imaging and the key developments by the market players.

Portable Segment is Expected to Hold a Significant Market Share Over the Forecast Period

The segment includes portable ultrasound machines, which are compact-sized mobile ultrasound systems designed to fit in small spaces, at a patient's bedside, or in the field. Portable ultrasound devices are used to diagnose a wide variety of chronic conditions, as well as in emergency medical services.

The segment is expected to grow during the forecast period owing to the increasing demand for portable ultrasound devices and the recent developments by the market players.

Research studies conducted by South African researchers have highlighted the efficacy of portable ultrasound devices that can lead to higher adoption of these devices in healthcare, home-based and on-field settings, which are projected to boost the segment's growth. For instance, a study published in the journal Cost Effectiveness and Resource Allocation in February 2021 demonstrated that portable continuous wave Doppler ultrasound technology showed safety, efficacy, and cost-effectiveness in primary healthcare in South Africa. The study stated that the portable continuous wave Doppler ultrasound enabled the routine antenatal diagnosis of pregnant women in primary healthcare centers, which can help medical practitioners to control the high burden of Unexplained fetal mortality in South Africa. Thus, such studies underline the vast application of portable ultrasound devices in various healthcare settings, which is expected to tap more patients and boost the segment's growth in the coming years.

Furthermore, the market players have made strategic decisions to increase the penetration of portable ultrasound devices in the South Africa market, which is anticipated to boost the segment's growth. For instance, in January 2023, Abdul Latif Jameel Health signed a new distribution agreement with iSono Health. Under the distribution agreement, Abdul Latif Jameel Health became the exclusive distributor of AI-driven portable 3D iSono Health's ATUSA scanner in the Global South region and countries including South Africa, Kenya, Nigeria, South Asia, and Southeast Asian territories. The company stated that it is expected to supply an additional 500 portable ultrasound devices, Butterfly iQ+, to healthcare practitioners in South Africa after the launch of the second phase of its deployment under the Bill & Melinda Gates Foundation grant in the first half of 2023. Thus, with such developments, the availability of portable ultrasound devices in South Africa will enable the market to penetrate the country further and boost its growth rate.

Therefore, the portable ultrasound segment is expected to witness significant growth over the forecast period due to its increasing demand and the recent developments by the market players.

South Africa Ultrasound Devices Industry Overview

The South African ultrasound devices market is competitive, with the presence of large players and few local players. Some of 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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition
1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS
4.1 Market Overview
4.2 Market Drivers
4.2.1 Increasing Incidences of Chronic Diseases
4.2.2 Improving Healthcare Infrastructure
4.3 Market Restraints
4.3.1 Lack of Skilled Professionals
4.4 Porter's Five Forces Analysis
4.4.1 Threat of New Entrants
4.4.2 Bargaining Power of Buyers/Consumers
4.4.3 Bargaining Power of Suppliers
4.4.4 Threat of Substitute Products
4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)
5.1 By Application
5.1.1 Cardiology
5.1.2 Gynecology/Obstetrics
5.1.3 Radiology
5.1.4 Other Applications
5.2 By Technology
5.2.1 2D Ultrasound Imaging
5.2.2 3D and 4D Ultrasound Imaging
5.2.3 Other technologies
5.3 By Type
5.3.1 Stationary Ultrasound
5.3.2 Portable Ultrasound

6 COMPETITIVE LANDSCAPE
6.1 Company Profiles
6.1.1 Canon Medical Systems Corporation
6.1.2 Fujifilm Holdings Corporation
6.1.3 GE Healthcare
6.1.4 Koninklijke Philips NV
6.1.5 Siemens Healthineers AG
6.1.6 Carestream Health Inc.
6.1.7 Samsung Electronics Co. Ltd
6.1.8 Hologic Inc.
6.1.9 Mindray Medical International Limited
6.1.10 Esaote SpA

6.1.11 Avacare Health

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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