

North America Therapeutic Ultrasound Market Assessment, By Technology [High Intensity Focused Ultrasound, Extracorporeal Shockwave Lithotripsy], By Application [Gynecology and Obstetrics, Oncology, Aesthetics and Cosmetology, Urology, Cardiology, Others], By End-user [Hospitals and Clinics, Ambulatory Surgery Centers, Cosmetic and Aesthetic Clinics, Others], By Country, Opportunities and Forecast, 2018-2032F

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Report description:

North America therapeutic ultrasound market is projected to witness a CAGR of 6.50% during the forecast period 2025-2032, growing from USD 637.43 million in 2024 to USD 1054.95 million in 2032. The market's growth can be attributed to the rising cases of cancer and gynecological and cardiac disorders, easy availability of advanced technological solutions in the region, strong presence of leading medical device manufacturers, and high investments in healthcare infrastructure. As per the estimates of the American Cancer Society, approximately 2 million new cancer cases are expected to be reported in the United States in 2025.

Increasing preference for non-invasive therapeutic solutions along with technological advancements are also driving the growth of the market. Therapeutic ultrasound uses high-frequency sound waves for various treatments, such as enhancing tissue healing, reducing pain, and eradicating abnormal tissues with precision. It is widely used in physiotherapy, oncology, cardiology, and urology, among others. The rising reliance on non-pharmacological treatment is creating an increased demand for therapeutic ultrasound systems in different regions across the globe. Additionally, the increasing prevalence of various chronic diseases and disorders is also propelling the market's expansion.

Strategic Collaborations Drive Market Growth

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The key medical device companies in the region are focusing on strategic collaborations and partnerships in order to expand their presence in the industry. The different advantages associated with such alliances include integration of advanced imaging technologies, including machine learning and AI, into ultrasound systems, enhancing treatment outcomes and diagnostic precision. Additionally, collaborations also ensure the availability of cutting-edge medical solutions in different regions across the globe. In February 2024, Shenzhen Mindray Bio-Medical Electronics Co., Ltd. signed an agreement with Ohio-based AEGLE MEDICAL SOLUTIONS LLC, under which the latter will be the sole distributor of Mindray's Hepatus-Series Transient Elastography Diagnostic Ultrasound systems, used for non-invasive management of liver diseases.

Technological Advancements Support Market Expansion

The increasing emphasis on technological advancements to accelerate product development, expand market reach, and augment innovations is positively influencing the expansion of the market. Technological advancements aid in integrating cutting edge technologies such as real time elastography and artificial intelligence (AI)-powered imaging, allowing medical professionals to improve treatment outcomes and diagnostic accuracy. In July 2024, Techsomed Ltd., a medical software innovator, has launched its BioTracelO Vision and BioTracelO Precision software in the United States, marking a significant advancement in image-guided ablation therapy. These FDA-cleared solutions are designed to enhance the precision and efficiency of liver tumor ablation procedures. BioTracelO Vision employs AI-based technology to provide personalized treatment planning and assessment tools using standard medical imaging. Additionally, BioTracelO Precision leverages real-time ultrasound data to offer predictive insights into post-ablation tissue damage.

Hospitals and Clinics Account for Significant Share of the Market

The dominance of the segment can be attributed to the wide range of therapeutic and diagnostic procedures offered by hospitals and clinics. These organizations are usually equipped with strong infrastructure and highly skilled professionals, allowing them to easily integrate advanced therapeutic technologies. Moreover, the high volume of specialized and routine ultrasound guided interventions in hospitals and clinics are also ensuring a steady requirement of therapeutic ultrasound devices.

Additionally, leading hospitals across the country are focusing on studying and integrating focused ultrasound therapies, providing lucrative growth opportunities to the market. For instance, in November 2023, Nicklaus Children's Health System became the third site in North America that is involved in Phase 1 clinical trial for evaluating the role of low-focused focused ultrasound in children with brain tumors in the brainstem. Such initiatives highlight the growing adoption of therapeutic ultrasound in advanced clinical settings and showcase its versatility beyond traditional applications.

United States Holds Major Market Share

The rapid expansion of the aging population, increasing reliance on advanced therapeutic solutions, strong presence of leading market players, and high accessibility to advanced technologies are driving the market's growth in the United States. As per the estimates of the Population Reference Bureau, the number of Americans that are 65 or older is expected to increase from 58 million in 2022 to 82 million by 2050. The older population requires frequent diagnostic testing, including imaging as well as prefers treatment solutions that cause the least amount of discomfort, supporting the market's expansion.

Additionally, the rising awareness about early disease diagnosis, growing preference for minimally invasive procedures and rapid expansion of portable ultrasounds and point of care systems are further propelling the market's growth in the country.

Impact of the U.S. Tariff on North America Therapeutic Ultrasound Market

Leading medical device manufacturing companies are expected to encounter significant financial strains due to these newly introduced tariffs by the United States. Major Medtech companies have also witnessed stock declines and are forced to either pass on the additional manufacturing costs on to the customers or absorb them, affecting the affordability and accessibility of such therapeutic solutions, particularly in homecare and outpatient settings, where cost sensitivity is high.

Small and medium-sized companies are expected to face the worse financial burdens as these companies often lack financial backing large companies have, resulting in market exit and reduced competitiveness, impacting product innovation.

Key Players Landscape and Outlook

The key players of the market are focused on product innovation and ensuring the availability of advanced medical and diagnostic solutions for the patient population. For instance, in October 2022, FUJIFILM Healthcare Americas Corporation received 510k clearance for its EG-740UT1 linear endoscopic ultrasound (EUS) scope that is compatible with its ARIETTA 8502 ultrasound processor. Such launches are allowing the leading players to expand their market presence as they improve clinical outcomes and

streamline procedures, addressing the evolving requirements of community hospitals, academic centers, and ambulatory surgical centers. The advanced features provided by the device allow physicians to obtain, locate, and target precise and accurate tissue samples from the intended organ, streamlining treatment plans.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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