

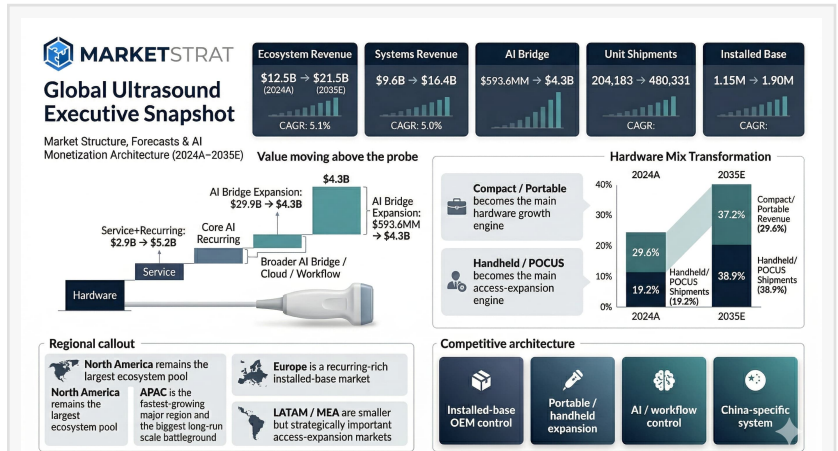
Marketstrat Releases 'Global Ultrasound Horizon: Market Structure, Forecasts, and AI Monetization Architecture' Report

New report maps the global ultrasound ecosystem from \$12.5B (2024A) to \$21.5B (2035E) and explains how value shifts to workflow, AI, cloud, and governance.

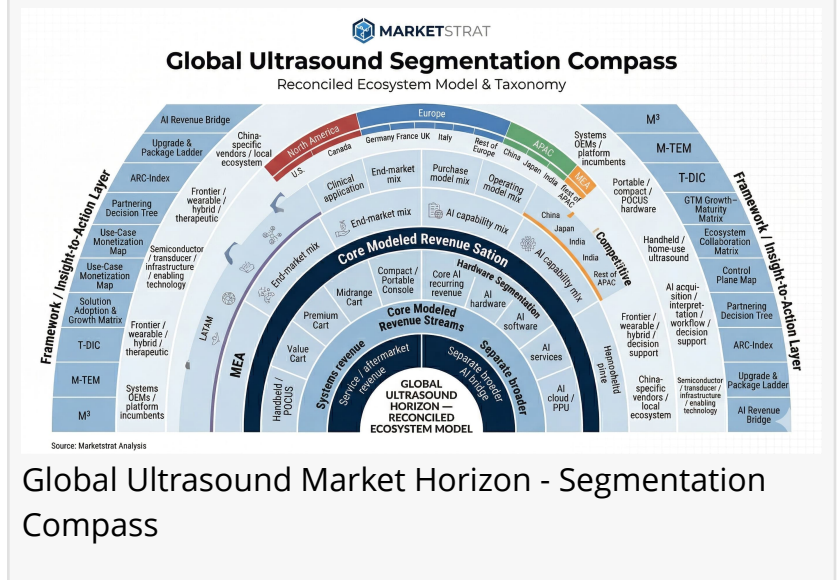
SACRAMENTO, CA, UNITED STATES, April 7, 2026 /EINPresswire.com/ -- Marketstrat today announced the release of its latest Markintel™ Horizon report, “Global Ultrasound Horizon: Market Structure, Forecasts, and AI Monetization Architecture (2024A–2035E).” The report provides a data-dense, decision-grade view of the global ultrasound systems market and the broader ultrasound ecosystem, integrating the AI layer as a first-class commercialization and value-capture lens across systems, service / aftermarket, and software-linked operating layers.

Marketstrat estimates that the global ultrasound ecosystem grows from \$12.5 billion in 2024A to \$21.5 billion in 2035E, while systems revenue increases from \$9.6 billion to \$16.4 billion. Over the same period, annual shipments rise from 204,183 to 480,331 units and installed base expands from 1.15 million to 1.90 million units, signaling a market that is broadening much faster than a simple topline revenue view suggests.

“Ultrasound is entering a new commercialization era where value capture increasingly comes from mix, distributed deployment, AI-guided workflow, and enterprise operating layers — not

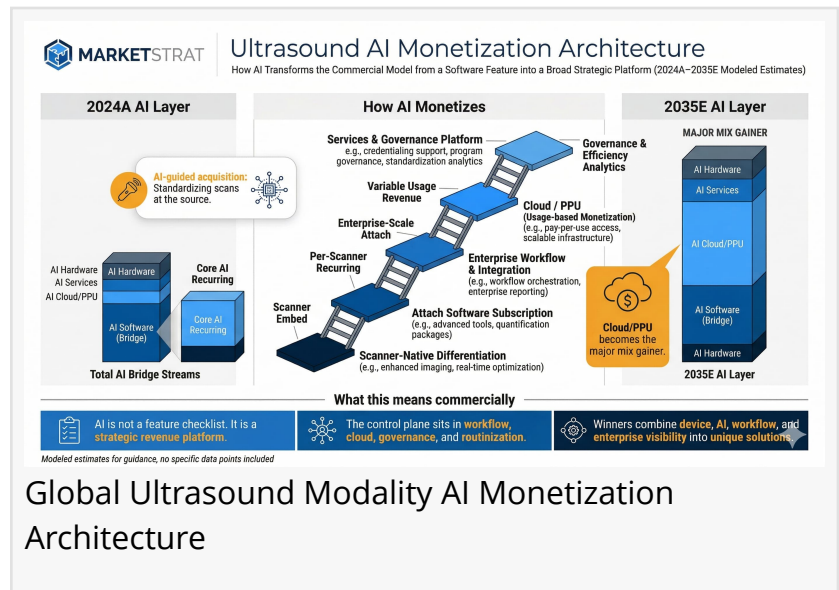


Global Ultrasound Market Horizon - Executive Snapshot



Global Ultrasound Market Horizon - Segmentation Compass

just from selling more carts,” said Sudheer Yerabati, Founder & CEO of Marketstrat. “This report is built for leaders who need to understand where value is forming, how competition is shifting above the probe, which technology transitions are becoming commercially material, and what packaging, platform, and partnership moves will matter most over the next decade.”



Global Ultrasound Modality AI Monetization Architecture

AI as monetization architecture, not a feature checklist

A central thesis of the report is that AI in ultrasound must be analyzed as a monetization architecture, not as a feature checklist. The modeled core AI recurring layer grows from \$288.0 million in 2024A to \$1.54 billion in 2035E, while the broader AI bridge expands from \$593.6 million to \$4.32 billion over the same period. The mix shift is the strategic message: software remains important, but cloud / PPU and services become increasingly central as workflow orchestration, QA, governance, and enterprise integration move closer to the control plane.

Compact / portable and handheld change the market’s operating logic

The report finds that ultrasound is best understood as a two-speed hardware market. Premium and midrange carts remain the value and installed-base core, but compact / portable consoles become the main hardware growth engine and handheld / POCUS becomes the main access-expansion engine. Compact / portable revenue rises from \$2.84 billion in 2024A to \$6.09 billion in 2035E, while handheld / POCUS grows from \$305.3 million to \$1.08 billion and nearly doubles its shipment share over the forecast horizon.

Global, regional, and country-level outlook

The report delivers a full standardized geography model covering:

- North America (U.S., Canada)
- Europe (Germany, France, UK, Italy, Rest of Europe)
- APAC (China, Japan, India, Rest of APAC)
- LATAM
- MEA

In the base case, North America remains the largest ecosystem pool, while APAC is the fastest-growing major region and the biggest long-run scale battleground. Europe remains a large, recurring-rich installed-base market, and LATAM and MEA remain smaller but strategically important access-expansion geographies. The report also argues that China requires a separate strategy, with procurement logic, domestic substitution, local AI, and export ambition reshaping the competitive perimeter.

Cluster-based competitive architecture

The report structures ultrasound competition into seven ecosystem clusters to clarify where moats sit and how value is captured:

- Systems OEMs / platform incumbents
- Portable / compact / POCUS hardware
- Handheld / home-use ultrasound
- AI acquisition / interpretation / workflow / decision support
- Frontier / wearable / hybrid / therapeutic
- Semiconductor / transducer / infrastructure / enabling technology
- China-specific vendors / local ecosystem

Across those clusters, the report highlights GE HealthCare, Philips, and Mindray as the most strategically consequential current players in the installed-base / systems layer, with Butterfly, Clarius, Exo, UltraSight, BrightHeart, Us2.ai, AS Software, Sonio, and SonoScape among the names pushing hardest on the parts of the market that are changing fastest.

Built on the Markintel™ Horizon framework stack

The report is built on [Marketstrat's Markintel™ Horizon methodology](#): a reconciled core market model, a broader AI bridge, and publishable market-structure views that reconcile back to the same totals. The report applies the full Horizon framework stack — including M³, M²TEM, T²DIC, Solution Adoption & Growth, Use-Case Monetization Map, ARC-Index, Ecosystem Collaboration, Partnering Decision Tree, Upgrade & Package Ladder, and AI Revenue Bridge — as an insight-to-action engine.

Availability

“Global Ultrasound Horizon: Market Structure, Forecasts, and AI Monetization Architecture (2024A–2035E)” is [available now](#). Executives can request the table of contents, sample figures, and licensing options by visiting <https://marketstrat.com/report/global-ultrasound-market-horizon-2026/> or contacting info@marketstrat.com. The report is published under the Markintel™ Horizon brand and is intended for executives, strategy teams, investors, providers,

and AI/workflow vendors with exposure to the evolving ultrasound ecosystem.

About Marketstrat

Marketstrat® is an independent market intelligence and advisory firm focused on MedTech, medical imaging and AI-enabled healthcare. Guided by its Markintel™ methodology, Marketstrat publishes specialized research and briefings, and provides custom research and advisory work that help leaders evaluate market opportunity, track competitive, regulatory, and evidence shifts, and make sharper strategy, product, and commercialization decisions.

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