

Global Sonobuoy Market Size Study & Forecast, by Type (Active and Passive), by Application and Regional Forecasts 2025-2035

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Abstracts

The Global Sonobuoy Market is valued at approximately USD 0.45 billion in 2024 and is projected to expand steadily at a CAGR of 6.50% over the forecast period 2025–2035. A sonobuoy, a compact, expendable sonar device used for anti-submarine warfare or underwater acoustic research, plays a pivotal role in the maritime defense ecosystem. Deployed by aircraft or ships, sonobuoys can detect underwater threats, map oceanic properties, and secure strategic naval operations. As naval forces across the globe aggressively modernize and digitize their maritime surveillance capabilities, demand for both active and passive sonobuoys is surging, fueled by the imperative to gain undersea situational awareness and supremacy.

The escalating geopolitical tensions, territorial disputes, and increased defense spending—especially in littoral and blue-water navy powers—have significantly reinforced the adoption of advanced sonobuoy technologies. Active sonobuoys, capable of emitting sonar pulses and detecting echoes from objects, are being integrated into multi-platform ASW (anti-submarine warfare) strategies. Meanwhile, passive variants are increasingly used for stealthier missions, listening to underwater soundscapes without revealing their presence. The commercial sector is also embracing sonobuoys, particularly for undersea infrastructure monitoring, oil exploration, and marine environmental assessments. However, despite these growth avenues, challenges such as limited battery life, data transmission complexities, and operational constraints in extreme oceanic environments continue to restrain widespread scalability.

Regionally, North America is anticipated to retain its dominance in the global sonobuoy market due to robust naval modernization programs spearheaded by the United States Navy, ongoing R&D efforts, and integration of sonobuoys with airborne and UAV

platforms. Europe, driven by NATO collaborations and rising defense initiatives from countries like the UK and France, also holds substantial market value. On the other hand, Asia Pacific is emerging as a high-growth corridor owing to rising maritime disputes in the South China Sea, strategic naval expansions by China and India, and increasing coastal surveillance investments across ASEAN nations. Latin America and the Middle East & Africa, although relatively nascent, are gradually stepping up their defense capabilities, creating new demand channels for sonobuoy manufacturers.

Major market player included in this report are:

Thales Group

Ultra Electronics Holdings plc

Sparton Corporation

Leonardo S.p.A.

General Dynamics Mission Systems

Raytheon Technologies Corporation

L3Harris Technologies Inc.

Saab AB

Northrop Grumman Corporation

Lockheed Martin Corporation

DSIT Solutions Ltd.

Kongsberg Gruppen

Japan Radio Company

BAE Systems plc

Teledyne Technologies Incorporated

Global Sonobuoy Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Type:

Active

Passive

By Application:

Defense

Commercial

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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