

Global Hydroacoustic Positioning Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Hydroacoustic Positioning Systems market size is expected to reach \$ 2490 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

The global production of Hydroacoustic Positioning Systems was reached 33,000 units in 2025, with an average price of US\$48,000 per unit.

Hydroacoustic Positioning Systems is a specialized technology used for tracking and locating underwater targets. It is widely used in marine scientific research, seabed topography mapping, ROV/AUV operation, and underwater construction. The system typically incorporates acoustic positioning methods such as ultra-short baseline (USBL), short baseline (SBL), or long baseline (LBL), calculating the target's relative position in the water through sound wave transmission between an underwater transponder and a receiver on board. These systems can integrate depth, tilt, and GPS sensor information to improve positioning accuracy and real-time response capabilities, making them an indispensable tool for high-precision underwater operations.

Currently, commonly used underwater positioning methods include acoustic navigation and inertial navigation. Acoustic positioning (such as LBL/USBL) relies on underwater acoustic beacon ranging and can provide meter-level accuracy; inertial navigation (INS) can estimate the track in real time, but drift increases over time. Multi-sensor-assisted positioning technologies such as geomagnetism, imagery, and topology are also under research. Research literature indicates that using DVL (Doppler velocimeter) to assist INS or introducing rasterized Bayesian estimation can improve accuracy.

In acoustic positioning, digital spread spectrum and broadband signal time difference

estimation techniques improve ranging accuracy; real-time sound velocity profile compensation technology can correct sound ray bending errors. Meanwhile, Ultra-short baseline (USBL) systems combining inertial and satellite positioning (buoys or surface vessels with GPS) can reduce surface drift errors. Advances in micro-inertial navigation chip technology have also led to low-cost, high-precision INS (such as FOG and MEMS).

Acoustic positioning systems are commercially mature, with Sonardyne, Kongsberg, and IXBLUE providing LBL/USBL equipment. Domestic marine equipment companies and research institutes have also launched underwater acoustic positioning instruments. Inertial navigation and acoustic fusion navigation systems (such as INS+DVL+USBL) are gradually becoming commercialized. Integrated navigation systems are already available on the market from companies such as Teledyne Gavia and SAAB Sweden. Long-term positioning algorithms (such as particle filtering and tightly coupled GNSS/INS) are being adopted by military and civilian aviation and unmanned systems. The sound velocity profile in the deep-sea environment is complex and variable, requiring precise calibration; otherwise, errors accumulate. Underwater sensors are susceptible to contamination and have a high probability of failure. Expensive inertial and acoustic equipment drives up costs, limiting their widespread adoption. The application of artificial intelligence technology in decision-making and navigation during autonomous navigation missions still requires extensive validation.

Underwater platforms are becoming increasingly intelligent, making the formation of underwater wireless sensor networks (UWSNs) a trend. Combining AUV swarms, UUVs, fixed sensor nodes, and the Internet of Things (IoT) concept to build an 'Underwater Internet of Things' (IoUT). Machine learning (ML) algorithms are being applied to channel estimation and adaptive scheduling. Research on multi-agent cooperation and formation control is active.

AI technology is bringing about a revolution in signal processing and network management. For example, deep learning can be used for equalization and identification of complex underwater acoustic channels, improving communication reliability; reinforcement learning is used to optimize resource allocation and routing decisions. Self-organizing network technology in multi-AUV swarms enables dynamic topology communication, and some research has already achieved multi-node mesh network experiments. Other innovative areas such as biomimetic sonar (mimicking dolphin echolocation) and underwater acoustic reference station clusters are also under exploration.

The military and research institutions have taken the lead in deployment, such as the US Navy and DARPA investing in multiple automated underwater systems (MANTA program). Smart ocean companies in Shenzhen, China, are exploring AUV IoT applications. Commercially, seabed sensor networks and autonomous vessels (such as seabed mining vehicles) are beginning to adopt integrated communication and positioning modules. Intelligent algorithm platforms (some open-source, such as the UWsim simulation environment) and commercial AI chips are also providing technical support to the industry.

Currently, the manufacturing cost and complexity of underwater acoustic equipment remain high, and some key components in the industry chain (such as deep-sea piezoelectric ceramics and low-noise amplifiers) are heavily reliant on international technology. Product homogenization is severe in the market, making it difficult to scale up niche applications; at the same time, the harsh marine environment leads to high equipment maintenance and upgrade costs. In terms of policy risks, it is necessary to consider environmental regulations (noise pollution) and restrictions on cross-border communication deployments due to maritime sovereignty.

This report studies the global Hydroacoustic Positioning Systems production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Hydroacoustic Positioning Systems and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Hydroacoustic Positioning Systems that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Hydroacoustic Positioning Systems total production and demand, 2021-2032, (Units)

Global Hydroacoustic Positioning Systems total production value, 2021-2032, (USD Million)

Global Hydroacoustic Positioning Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Hydroacoustic Positioning Systems consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Hydroacoustic Positioning Systems domestic production, consumption, key domestic manufacturers and share

Global Hydroacoustic Positioning Systems production by manufacturer, production,

price, value and market share 2021-2026, (USD Million) & (Units)

Global Hydroacoustic Positioning Systems production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Hydroacoustic Positioning Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Hydroacoustic Positioning Systems market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include EvoLogics, Kongsberg, LinkQuest, Sonardyne, Exail, Teledyne Benthos, Blueprint Design, The 715th Research Institute of China State Shipbuilding Corporation Limited, Harbin Engineering University, The Institute of Acoustics of the Chinese Academy of Sciences, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Hydroacoustic Positioning Systems market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Hydroacoustic Positioning Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Hydroacoustic Positioning Systems Market, Segmentation by Type:

Ultra Short Baseline Positioning

Short Baseline Positioning

Long Baseline Positioning

Global Hydroacoustic Positioning Systems Market, Segmentation by Deployment Method:

Underwater Engineering Equipment

Underwater Robots

Seabed Observation Network

Others

Global Hydroacoustic Positioning Systems Market, Segmentation by Product:

Underwater Acoustic Positioning Beacon

Underwater Acoustic Positioning Base Station

Global Hydroacoustic Positioning Systems Market, Segmentation by Application:

Military

Industrial

Consumer

Companies Profiled:

EvoLogics

Kongsberg

LinkQuest

Sonardyne

Exail

Teledyne Benthos

Blueprint Design

The 715th Research Institute of China State Shipbuilding Corporation Limited

Harbin Engineering University

The Institute of Acoustics of the Chinese Academy of Sciences

Northwestern Polytechnical University

Jiaxing Acoustics Technology

Shenzhen Smart Ocean Technology

Whale Wave Technology

Shenzhen Zhilan Technology

Key Questions Answered:

1. How big is the global Hydroacoustic Positioning Systems market?
2. What is the demand of the global Hydroacoustic Positioning Systems market?
3. What is the year over year growth of the global Hydroacoustic Positioning Systems market?
4. What is the production and production value of the global Hydroacoustic Positioning Systems market?
5. Who are the key producers in the global Hydroacoustic Positioning Systems market?
6. What are the growth factors driving the market demand?

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