

# Global Marine Propulsion Control System Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Marine Propulsion Control System market size is expected to reach \$ million by 2032, rising at a market growth of %CAGR during the forecast period (2026-2032). As a core component connecting bridge control commands with main engine/gearbox/propeller actuators in modern engine room automation and bridge integrated control, the marine propulsion control system addresses the pain points of traditional mechanical cable-operated/local electronic control systems under long-range, multi-condition conditions, such as thrust response lag, poor matching between the main engine and controllable pitch propeller (CPP), poor control consistency, high fuel consumption, and insufficient redundancy and safety interlocks. In traditional engine room layouts, main engine throttle, gearbox reversing, and CPP pitch are often controlled by independent control units or local electronic control systems. Manual coordination during container handling can easily lead to thrust overshoot or response lag during berthing, unberthing, maneuvering in narrow waterways, and switching between single and dual propellers, increasing the risk of collisions and scrapes. On offshore vessels, tugboats, and offshore supply vessels (OSVs) that emphasize low-speed, high-thrust and DP positioning, traditional propulsion control struggles to achieve precise thrust distribution and fuel optimization in coupled systems with multiple propellers, rudders, and side thrusters. On medium and large commercial ships, poor matching between main engine load changes and pitch/shaft speed can lead to increased fuel consumption, excessive emissions, and accelerated mechanical fatigue. Marine propulsion control systems integrate bridge control handles, electronic throttle modules, CPP/gearbox control valve groups, propulsion motor inverters, and various sensors into a centralized control logic. This enables coordinated control of main engine power, shaft speed, propeller pitch angle, and thrust output, allowing ships to maintain predictable thrust response and optimal fuel economy under different operating conditions. Furthermore, redundant control channels and multi-level interlocks (such as

over-speed, low oil pressure, and emergency stop) enhance safety, making it one of the key systems for meeting IMO maneuverability, energy efficiency, and emission regulations. In 2024, the number of new Marine Propulsion Control Systems installed in global new shipbuilding and major conversion projects was approximately 8,300-9,200 units. Based on the number of propulsion control systems per ship, the average price per system was approximately USD 16,400, with a gross profit margin of approximately 24%-32%. A typical system structure includes a bridge propulsion control console (including single/dual control handles, mode selection and emergency stop buttons), an engine room propulsion control unit (including PLC or dedicated controller, redundant power supply, I/O modules), actuator modules connected to the main engine/gearbox/ CPP or electric propulsion inverter, propulsion system sensors (speed, torque, oil pressure, oil temperature, pitch feedback), communication networks (CAN, redundant Ethernet, serial bus), and alarm/event logging software. In terms of parameters, a typical system supports 1-4 main propulsion units (main engine + gearbox + propeller or motor + gearbox + propeller). Control modes include in-port/offshore/DP/towing/emergency modes. Communication interfaces support MODBUS, CAN, NMEA 2000, redundant Ethernet, etc. The system is designed for an ambient temperature of -15 to +55 °C, and its vibration resistance meets the requirements of classification societies. Power supplies are mostly 24 V DC + 230/400 V AC with redundancy. In terms of typical usage, a small offshore workboat/tugboat is usually equipped with one single-engine propulsion control system; a PSV/OSV with twin engines, twin propellers, and bow thrusters is usually equipped with one integrated propulsion control system + DP interface; medium and large bulk carriers, tankers, and container ships are mostly equipped with one main propulsion control system + shut-off box/emergency control device; and offshore engineering vessels, ferries, and high-end yachts often have their original mechanical or hybrid control systems converted to fully electronic propulsion control systems during retrofitting/upgrading.

#### Supply Situation

Upstream components include industrial-grade PLCs and redundant controllers, propulsion control power modules and I/O modules, industrial-grade communication modules (CAN/Ethernet), human-machine interfaces and control handle assemblies, sensors (speed, torque, pitch feedback, hydraulic pressure/temperature), cables and connectors, etc. Raw materials and standard industrial control components account for approximately 48%-60% of the total system cost. Price fluctuations in industrial control hardware and customized propulsion control handles/panels have the greatest impact on cost. Key upstream suppliers include Siemens, Beijer Electronics, WAGO, Parker Hannifin, and Baumer.

#### Manufacturer Characteristics

Kongsberg holds a high market share in the Norwegian and global market for propulsion

control and integrated maneuvering systems for offshore vessels, offshore supply vessels, and special-purpose vessels; Wartsila, ABB, SCHOTTEL, and Berg Propulsion are highly competitive in merchant and special-purpose vessel projects thanks to their integrated solutions of propulsion equipment + control system + power system; Praxis and RH Marine have a strong presence in mid-to-high-end engineering vessels and government vessels; Everllence and some regional suppliers are accelerating their penetration in the small and medium-sized workboat and local shipbuilding markets.

#### Case Study

In January 2025, Arriva, a long-term customer of Berg Propulsion, upgraded its general cargo ship *Norjarl* (5335 gross tons) by installing Berg's MPC800 control system and dynamic drive system. The project aimed to reduce speed and optimize energy use, thereby enabling this vessel, built in 2009, to maintain a competitive edge in the low-carbon era of the shipping industry. After months of monitoring the *Norjarl*'s performance in the North Sea and Baltic Sea, overall fuel efficiency savings exceeding 10% have been confirmed. Based on this, the shipowner has signed a second conversion contract with Berg to refit the 4,183 gross ton general cargo ship *Norbris*.

#### Applications

Marine propulsion control systems are widely used in new construction and conversion projects for offshore supply vessels (PSVs/OSVs), tugboats, offshore support vessels, workboats, ferries and ro-ro passenger ships, medium and large bulk carriers, tankers, container ships, offshore wind power maintenance vessels, tugboats, and high-end yachts. They are key control units connecting the bridge controls with the main engine/propeller actuators. Typical customers include shipowners and operators such as Maersk Supply Service, DOF Group, Island Offshore, COSCO Shipping, and Stena Line, as well as mainstream shipbuilding companies providing turnkey solutions.

#### Technological Trends

Technological evolution is focused on four directions: First, deep integration of propulsion control with electric propulsion/hybrid power, unifying the main engine, generator, electric propulsion motor, and propulsion control under the same energy management logic to achieve thrust smoothing and fuel/electric energy optimization during operating condition switching; second, real-time data fusion of the propulsion control system with the DP/bridge integrated system, integrating propulsion control into the DP, navigation radar, positioning system, and energy efficiency management platform through high-bandwidth redundant Ethernet and time synchronization protocols to achieve thrust allocation optimization and automatic berthing/dynamic positioning support; third, remote diagnostics and lifecycle support, uploading operational data and alarm events collected by the propulsion control system to the cloud or shore-based center to support remote fault diagnosis, software upgrades, and data-driven maintenance recommendations; fourth, optimization of human-machine interface and

redundant architecture, improving the ergonomics and operational consistency of the control handle, and ensuring the controllability of propulsion control under fault conditions through dual-controller hot backup, dual-network architecture, and fail-safe modes. Overall, propulsion control systems are evolving towards deep integration with electric propulsion, integration with ship automation systems, and extension towards remote operation and maintenance and intelligent decision-making.

#### Market Influencing Factors

Market growth is driven by multiple factors: On the one hand, the demand for new offshore vessels and workboats driven by global oil and gas and offshore wind power development, as well as the retrofitting of propulsion and automation systems on older vessels to meet IMO energy efficiency indices (EEXI, CII) and emission regulations, directly promotes the upgrading and addition of propulsion control systems. On the other hand, the increasing precision and safety requirements for tugboats, harbor work vessels, and near-shore multipurpose vessels in port handling, towing, and berthing operations have prompted shipowners to upgrade from traditional mechanical or simple electronic propulsion control to comprehensive propulsion control systems with multi-mode, redundancy, and interfaces with DP systems. Simultaneously, the global shipbuilding center is shifting towards China, South Korea, and some Southeast Asian countries, enabling regional suppliers and leading international companies to participate in more project bidding through joint ventures and localized production. On the cost side, fluctuations in industrial control hardware, copper prices, electronic components, and engineering labor prices, especially in the supply shortages and upward price pressures on industrial control chips and communication modules in some years, contribute to this growth. Overall, the marine propulsion control system market exhibits a pattern of 'parallel growth driven by new shipbuilding and retrofitting + greater demand elasticity for offshore engineering and workboats + competition between international brands and regional manufacturers + incremental value brought by intelligent and electric propulsion.' It is expected to maintain stable to moderate growth in the next few years, while maintaining high technical thresholds and integration barriers in high-end projects.

This report studies the global Marine Propulsion Control System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Marine Propulsion Control System 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 Marine Propulsion Control System that contribute to its increasing demand across many markets.

#### **Highlights and key features of the study**

Global Marine Propulsion Control System total production and demand, 2021-2032,

(Units)

Global Marine Propulsion Control System total production value, 2021-2032, (USD Million)

Global Marine Propulsion Control System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Marine Propulsion Control System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Marine Propulsion Control System domestic production, consumption, key domestic manufacturers and share

Global Marine Propulsion Control System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Marine Propulsion Control System production by Touchscreen Size, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Marine Propulsion Control System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Marine Propulsion Control System 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 Wartsila, Kongsberg, Everllence, Berg Propulsion, Noris Group, SCHOTTEL, Sturdy Corporation, RH Marine, Praxis Automation Technology, ABB, 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 Marine Propulsion Control System market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Touchscreen Size, 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 Marine Propulsion Control System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Marine Propulsion Control System Market, Segmentation by Touchscreen Size:

2.5?

5.7?

8?

Others

### Global Marine Propulsion Control System Market, Segmentation by Main Engine Power:

10 MW

### Global Marine Propulsion Control System Market, Segmentation by Thrust Response Time:

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Marine Propulsion Control System Introduction
- 1.2 World Marine Propulsion Control System Supply & Forecast
  - 1.2.1 World Marine Propulsion Control System Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Marine Propulsion Control System Production (2021-2032)
  - 1.2.3 World Marine Propulsion Control System Pricing Trends (2021-2032)
- 1.3 World Marine Propulsion Control System Production by Region (Based on Production Site)
  - 1.3.1 World Marine Propulsion Control System Production Value by Region (2021-2032)
  - 1.3.2 World Marine Propulsion Control System Production by Region (2021-2032)
  - 1.3.3 World Marine Propulsion Control System Average Price by Region (2021-2032)
  - 1.3.4 North America Marine Propulsion Control System Production (2021-2032)
  - 1.3.5 Europe Marine Propulsion Control System Production (2021-2032)
  - 1.3.6 China Marine Propulsion Control System Production (2021-2032)
  - 1.3.7 Japan Marine Propulsion Control System Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Marine Propulsion Control System Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Marine Propulsion Control System Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Marine Propulsion Control System Demand (2021-2032)
- 2.2 World Marine Propulsion Control System Consumption by Region
  - 2.2.1 World Marine Propulsion Control System Consumption by Region (2021-2026)
  - 2.2.2 World Marine Propulsion Control System Consumption Forecast by Region (2027-2032)
- 2.3 United States Marine Propulsion Control System Consumption (2021-2032)
- 2.4 China Marine Propulsion Control System Consumption (2021-2032)
- 2.5 Europe Marine Propulsion Control System Consumption (2021-2032)
- 2.6 Japan Marine Propulsion Control System Consumption (2021-2032)
- 2.7 South Korea Marine Propulsion Control System Consumption (2021-2032)
- 2.8 ASEAN Marine Propulsion Control System Consumption (2021-2032)
- 2.9 India Marine Propulsion Control System Consumption (2021-2032)

### **3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS**

- 3.1 World Marine Propulsion Control System Production Value by Manufacturer (2021-2026)
- 3.2 World Marine Propulsion Control System Production by Manufacturer (2021-2026)
- 3.3 World Marine Propulsion Control System Average Price by Manufacturer (2021-2026)
- 3.4 Marine Propulsion Control System Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global Marine Propulsion Control System Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for Marine Propulsion Control System in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for Marine Propulsion Control System in 2025
- 3.6 Marine Propulsion Control System Market: Overall Company Footprint Analysis
  - 3.6.1 Marine Propulsion Control System Market: Region Footprint
  - 3.6.2 Marine Propulsion Control System Market: Company Product Type Footprint
  - 3.6.3 Marine Propulsion Control System Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

### **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: Marine Propulsion Control System Production Value Comparison
  - 4.1.1 United States VS China: Marine Propulsion Control System Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: Marine Propulsion Control System Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Marine Propulsion Control System Production Comparison
  - 4.2.1 United States VS China: Marine Propulsion Control System Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Marine Propulsion Control System Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Marine Propulsion Control System Consumption

## Comparison

### 4.3.1 United States VS China: Marine Propulsion Control System Consumption

#### Comparison (2021 & 2025 & 2032)

### 4.3.2 United States VS China: Marine Propulsion Control System Consumption Market Share Comparison (2021 & 2025 & 2032)

## 4.4 United States Based Marine Propulsion Control System Manufacturers and Market Share, 2021-2026

### 4.4.1 United States Based Marine Propulsion Control System Manufacturers, Headquarters and Production Site (States, Country)

### 4.4.2 United States Based Manufacturers Marine Propulsion Control System Production Value (2021-2026)

### 4.4.3 United States Based Manufacturers Marine Propulsion Control System Production (2021-2026)

## 4.5 China Based Marine Propulsion Control System Manufacturers and Market Share

### 4.5.1 China Based Marine Propulsion Control System Manufacturers, Headquarters and Production Site (Province, Country)

### 4.5.2 China Based Manufacturers Marine Propulsion Control System Production Value (2021-2026)

### 4.5.3 China Based Manufacturers Marine Propulsion Control System Production (2021-2026)

## 4.6 Rest of World Based Marine Propulsion Control System Manufacturers and Market Share, 2021-2026

### 4.6.1 Rest of World Based Marine Propulsion Control System Manufacturers, Headquarters and Production Site (State, Country)

### 4.6.2 Rest of World Based Manufacturers Marine Propulsion Control System Production Value (2021-2026)

### 4.6.3 Rest of World Based Manufacturers Marine Propulsion Control System Production (2021-2026)

## **5 MARKET ANALYSIS BY TOUCHSCREEN SIZE**

### 5.1 World Marine Propulsion Control System Market Size Overview by Touchscreen Size: 2021 VS 2025 VS 2032

### 5.2 Segment Introduction by Touchscreen Size

#### 5.2.1 2.5?

#### 5.2.2 5.7?

#### 5.2.3 8?

#### 5.2.4 Others

### 5.3 Market Segment by Touchscreen Size

5.3.1 World Marine Propulsion Control System Production by Touchscreen Size (2021-2032)

5.3.2 World Marine Propulsion Control System Production Value by Touchscreen Size (2021-2032)

5.3.3 World Marine Propulsion Control System Average Price by Touchscreen Size (2021-2032)

## **6 MARKET ANALYSIS BY MAIN ENGINE POWER**

6.1 World Marine Propulsion Control System Market Size Overview by Main Engine Power: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Main Engine Power

6.2.1 10 MW

6.3 Market Segment by Main Engine Power

6.3.1 World Marine Propulsion Control System Production by Main Engine Power (2021-2032)

6.3.2 World Marine Propulsion Control System Production Value by Main Engine Power (2021-2032)

6.3.3 World Marine Propulsion Control System Average Price by Main Engine Power (2021-2032)

## **7 MARKET ANALYSIS BY THRUST RESPONSE TIME**

7.1 World Marine Propulsion Control System Market Size Overview by Thrust Response Time: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Thrust Response Time

7.2.1

## List Of Tables

### LIST OF TABLES

Table 1. World Marine Propulsion Control System Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Marine Propulsion Control System Production Value by Region (2021-2026) & (USD Million)

Table 3. World Marine Propulsion Control System Production Value by Region (2027-2032) & (USD Million)

Table 4. World Marine Propulsion Control System Production Value Market Share by Region (2021-2026)

Table 5. World Marine Propulsion Control System Production Value Market Share by Region (2027-2032)

Table 6. World Marine Propulsion Control System Production by Region (2021-2026) & (Units)

Table 7. World Marine Propulsion Control System Production by Region (2027-2032) & (Units)

Table 8. World Marine Propulsion Control System Production Market Share by Region (2021-2026)

Table 9. World Marine Propulsion Control System Production Market Share by Region (2027-2032)

Table 10. World Marine Propulsion Control System Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World Marine Propulsion Control System Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. Marine Propulsion Control System Major Market Trends

Table 13. World Marine Propulsion Control System Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Marine Propulsion Control System Consumption by Region (2021-2026) & (Units)

Table 15. World Marine Propulsion Control System Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Marine Propulsion Control System Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Marine Propulsion Control System Producers in 2025

Table 18. World Marine Propulsion Control System Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Marine Propulsion Control System Producers in 2025

Table 20. World Marine Propulsion Control System Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Marine Propulsion Control System Company Evaluation Quadrant

Table 22. World Marine Propulsion Control System Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Marine Propulsion Control System Production Site of Key Manufacturer

Table 24. Marine Propulsion Control System Market: Company Product Type Footprint

Table 25. Marine Propulsion Control System Market: Company Product Application Footprint

Table 26. Marine Propulsion Control System Competitive Factors

Table 27. Marine Propulsion Control System New Entrant and Capacity Expansion Plans

Table 28. Marine Propulsion Control System Mergers & Acquisitions Activity

Table 29. United States VS China Marine Propulsion Control System Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Marine Propulsion Control System Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Marine Propulsion Control System Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Marine Propulsion Control System Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Marine Propulsion Control System Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Marine Propulsion Control System Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Marine Propulsion Control System Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Marine Propulsion Control System Production Market Share (2021-2026)

Table 37. China Based Marine Propulsion Control System Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Marine Propulsion Control System Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Marine Propulsion Control System Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Marine Propulsion Control System Production,

(2021-2026) & (Units)

Table 41. China Based Manufacturers Marine Propulsion Control System Production Market Share (2021-2026)

Table 42. Rest of World Based Marine Propulsion Control System Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Marine Propulsion Control System Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Marine Propulsion Control System Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Marine Propulsion Control System Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Marine Propulsion Control System Production Market Share (2021-2026)

Table 47. World Marine Propulsion Control System Production Value by Touchscreen Size, (USD Million), 2021 & 2025 & 2032

Table 48. World Marine Propulsion Control System Production by Touchscreen Size (2021-2026) & (Units)

Table 49. World Marine Propulsion Control System Production by Touchscreen Size (2027-2032) & (Units)

Table 50. World Marine Propulsion Control System Production Value by Touchscreen Size (2021-2026) & (USD Million)

Table 51. World Marine Propulsion Control System Production Value by Touchscreen Size (2027-2032) & (USD Million)

Table 52. World Marine Propulsion Control System Average Price by Touchscreen Size (2021-2026) & (K US\$/Unit)

Table 53. World Marine Propulsion Control System Average Price by Touchscreen Size (2027-2032) & (K US\$/Unit)

Table 54. World Marine Propulsion Control System Production Value by Main Engine Power, (USD Million), 2021 & 2025 & 2032

Table 55. World Marine Propulsion Control System Production by Main Engine Power (2021-2026) & (Units)

Table 56. World Marine Propulsion Control System Production by Main Engine Power (2027-2032) & (Units)

Table 57. World Marine Propulsion Control System Production Value by Main Engine Power (2021-2026) & (USD Million)

Table 58. World Marine Propulsion Control System Production Value by Main Engine Power (2027-2032) & (USD Million)

Table 59. World Marine Propulsion Control System Average Price by Main Engine Power (2021-2026) & (K US\$/Unit)

Table 60. World Marine Propulsion Control System Average Price by Main Engine Power (2027-2032) & (K US\$/Unit)

Table 61. World Marine Propulsion Control System Production Value by Thrust Response Time, (USD Million), 2021 & 2025 & 2032

Table 62. World Marine Propulsion Control System Production by Thrust Response Time (2021-2026) & (Units)

Table 63. World Marine Propulsion Control System Production by Thrust Response Time (2027-2032) & (Units)

Table 64. World Marine Propulsion Control System Production Value by Thrust Response Time (2021-2026) & (USD Million)

Table 65. World Marine Propulsion Control System Production Value by Thrust Response Time (2027-2032) & (USD Million)

Table 66. World Marine Propulsion Control System Average Price by Thrust Response Time (2021-2026) & (K US\$/Unit)

Table 67. World Marine Propulsion Control System Average Price by Thrust Response Time (2027-2032) & (K US\$/Unit)

Table 68. World Marine Propulsion Control System Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Marine Propulsion Control System Production by Application (2021-2026) & (Units)

Table 70. World Marine Propulsion Control System Production by Application (2027-2032) & (Units)

Table 71. World Marine Propulsion Control System Production Value by Application (2021-2026) & (USD Million)

Table 72. World Marine Propulsion Control System Production Value by Application (2027-2032) & (USD Million)

Table 73. World Marine Propulsion Control System Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World Marine Propulsion Control System Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. Wartsila Basic Information, Manufacturing Base and Competitors

Table 76. Wartsila Major Business

Table 77. Wartsila Marine Propulsion Control System Product and Services

Table 78. Wartsila Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Wartsila Recent Developments/Updates

Table 80. Wartsila Competitive Strengths & Weaknesses

Table 81. Kongsberg Basic Information, Manufacturing Base and Competitors

Table 82. Kongsberg Major Business

Table 83. Kongsberg Marine Propulsion Control System Product and Services

Table 84. Kongsberg Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Kongsberg Recent Developments/Updates

Table 86. Kongsberg Competitive Strengths & Weaknesses

Table 87. Everllence Basic Information, Manufacturing Base and Competitors

Table 88. Everllence Major Business

Table 89. Everllence Marine Propulsion Control System Product and Services

Table 90. Everllence Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Everllence Recent Developments/Updates

Table 92. Everllence Competitive Strengths & Weaknesses

Table 93. Berg Propulsion Basic Information, Manufacturing Base and Competitors

Table 94. Berg Propulsion Major Business

Table 95. Berg Propulsion Marine Propulsion Control System Product and Services

Table 96. Berg Propulsion Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Berg Propulsion Recent Developments/Updates

Table 98. Berg Propulsion Competitive Strengths & Weaknesses

Table 99. Noris Group Basic Information, Manufacturing Base and Competitors

Table 100. Noris Group Major Business

Table 101. Noris Group Marine Propulsion Control System Product and Services

Table 102. Noris Group Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Noris Group Recent Developments/Updates

Table 104. Noris Group Competitive Strengths & Weaknesses

Table 105. SCHOTTEL Basic Information, Manufacturing Base and Competitors

Table 106. SCHOTTEL Major Business

Table 107. SCHOTTEL Marine Propulsion Control System Product and Services

Table 108. SCHOTTEL Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. SCHOTTEL Recent Developments/Updates

Table 110. SCHOTTEL Competitive Strengths & Weaknesses

- Table 111. Sturdy Corporation Basic Information, Manufacturing Base and Competitors
- Table 112. Sturdy Corporation Major Business
- Table 113. Sturdy Corporation Marine Propulsion Control System Product and Services
- Table 114. Sturdy Corporation Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. Sturdy Corporation Recent Developments/Updates
- Table 116. Sturdy Corporation Competitive Strengths & Weaknesses
- Table 117. RH Marine Basic Information, Manufacturing Base and Competitors
- Table 118. RH Marine Major Business
- Table 119. RH Marine Marine Propulsion Control System Product and Services
- Table 120. RH Marine Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. RH Marine Recent Developments/Updates
- Table 122. RH Marine Competitive Strengths & Weaknesses
- Table 123. Praxis Automation Technology Basic Information, Manufacturing Base and Competitors
- Table 124. Praxis Automation Technology Major Business
- Table 125. Praxis Automation Technology Marine Propulsion Control System Product and Services
- Table 126. Praxis Automation Technology Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. Praxis Automation Technology Recent Developments/Updates
- Table 128. Praxis Automation Technology Competitive Strengths & Weaknesses
- Table 129. ABB Basic Information, Manufacturing Base and Competitors
- Table 130. ABB Major Business
- Table 131. ABB Marine Propulsion Control System Product and Services
- Table 132. ABB Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. ABB Recent Developments/Updates
- Table 134. ABB Competitive Strengths & Weaknesses
- Table 135. Veth Propulsion Basic Information, Manufacturing Base and Competitors
- Table 136. Veth Propulsion Major Business
- Table 137. Veth Propulsion Marine Propulsion Control System Product and Services
- Table 138. Veth Propulsion Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 139. Veth Propulsion Recent Developments/Updates

Table 140. Veth Propulsion Competitive Strengths & Weaknesses

Table 141. Emerson Basic Information, Manufacturing Base and Competitors

Table 142. Emerson Major Business

Table 143. Emerson Marine Propulsion Control System Product and Services

Table 144. Emerson Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 145. Emerson Recent Developments/Updates

Table 146. Emerson Competitive Strengths & Weaknesses

Table 147. Tritex Basic Information, Manufacturing Base and Competitors

Table 148. Tritex Major Business

Table 149. Tritex Marine Propulsion Control System Product and Services

Table 150. Tritex Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 151. Tritex Recent Developments/Updates

Table 152. Tritex Competitive Strengths & Weaknesses

Table 153. Radamec Basic Information, Manufacturing Base and Competitors

Table 154. Radamec Major Business

Table 155. Radamec Marine Propulsion Control System Product and Services

Table 156. Radamec Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 157. Radamec Recent Developments/Updates

Table 158. Radamec Competitive Strengths & Weaknesses

Table 159. Glendinning Basic Information, Manufacturing Base and Competitors

Table 160. Glendinning Major Business

Table 161. Glendinning Marine Propulsion Control System Product and Services

Table 162. Glendinning Marine Propulsion Control System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 163. Glendinning Recent Developments/Updates

Table 164. Glendinning Competitive Strengths & Weaknesses

Table 165. Global Key Players of Marine Propulsion Control System Upstream (Raw Materials)

Table 166. Global Marine Propulsion Control System Typical Customers

Table 167. Marine Propulsion Control System Typical Distributors



## List Of Figures

### LIST OF FIGURES

Figure 1. Marine Propulsion Control System Picture

Figure 2. World Marine Propulsion Control System Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Marine Propulsion Control System Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Marine Propulsion Control System Production (2021-2032) & (Units)

Figure 5. World Marine Propulsion Control System Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Marine Propulsion Control System Production Value Market Share by Region (2021-2032)

Figure 7. World Marine Propulsion Control System Production Market Share by Region (2021-2032)

Figure 8. North America Marine Propulsion Control System Production (2021-2032) & (Units)

Figure 9. Europe Marine Propulsion Control System Production (2021-2032) & (Units)

Figure 10. China Marine Propulsion Control System Production (2021-2032) & (Units)

Figure 11. Japan Marine Propulsion Control System Production (2021-2032) & (Units)

Figure 12. Marine Propulsion Control System Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Marine Propulsion Control System Consumption (2021-2032) & (Units)

Figure 15. World Marine Propulsion Control System Consumption Market Share by Region (2021-2032)

Figure 16. United States Marine Propulsion Control System Consumption (2021-2032) & (Units)

Figure 17. China Marine Propulsion Control System Consumption (2021-2032) & (Units)

Figure 18. Europe Marine Propulsion Control System Consumption (2021-2032) & (Units)

Figure 19. Japan Marine Propulsion Control System Consumption (2021-2032) & (Units)

Figure 20. South Korea Marine Propulsion Control System Consumption (2021-2032) & (Units)

Figure 21. ASEAN Marine Propulsion Control System Consumption (2021-2032) & (Units)

Figure 22. India Marine Propulsion Control System Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Marine Propulsion Control System by Manufacturer

Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Marine Propulsion Control System Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Marine Propulsion Control System Markets in 2025

Figure 26. United States VS China: Marine Propulsion Control System Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Marine Propulsion Control System Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Marine Propulsion Control System Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Marine Propulsion Control System Production Market Share 2025

Figure 30. China Based Manufacturers Marine Propulsion Control System Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Marine Propulsion Control System Production Market Share 2025

Figure 32. World Marine Propulsion Control System Production Value by Touchscreen Size, (USD Million), 2021 & 2025 & 2032

Figure 33. World Marine Propulsion Control System Production Value Market Share by Touchscreen Size in 2025

Figure 34. 2.5?

Figure 35. 5.7?

Figure 36. 8?

Figure 37. Others

Figure 38. World Marine Propulsion Control System Production Market Share by Touchscreen Size (2021-2032)

Figure 39. World Marine Propulsion Control System Production Value Market Share by Touchscreen Size (2021-2032)

Figure 40. World Marine Propulsion Control System Average Price by Touchscreen Size (2021-2032) & (K US\$/Unit)

Figure 41. World Marine Propulsion Control System Production Value by Main Engine Power, (USD Million), 2021 & 2025 & 2032

Figure 42. World Marine Propulsion Control System Production Value Market Share by Main Engine Power in 2025

Figure 43. 10 MW

Figure 46. World Marine Propulsion Control System Production Market Share by Main Engine Power (2021-2032)

Figure 47. World Marine Propulsion Control System Production Value Market Share by

Main Engine Power (2021-2032)

Figure 48. World Marine Propulsion Control System Average Price by Main Engine Power (2021-2032) & (K US\$/Unit)

Figure 49. World Marine Propulsion Control System Production Value by Thrust Response Time, (USD Million), 2021 & 2025 & 2032

Figure 50. World Marine Propulsion Control System Production Value Market Share by Thrust Response Time in 2025

Figure 51.

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