

Global Marine Seismic Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Marine Seismic Equipment market size is expected to reach \$ 1222 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

Marine seismic equipment refers to a set of specialized instruments and systems used in marine exploration to study and map the subsurface structures and geological formations beneath the seabed. This equipment is commonly employed in various industries, including oil and gas exploration, environmental research, geological studies, and underwater resource assessment. The primary purpose of marine seismic equipment is to gather data about the Earth's subsurface by emitting sound waves (seismic waves) into the water and recording the echoes or reflections that bounce back from different layers of the Earth's crust.

In 2025, global Marine Seismic Equipment sales volume reached 92.8 k units, with average price of 8.2k US\$ per unit.

Demand is shifting from broad frontier exploration to higher-value subsurface imaging. Marine seismic equipment demand is still linked to offshore oil and gas exploration, but customers are increasingly focused on improving reservoir understanding, reducing drilling risk, and supporting field redevelopment rather than only acquiring large regional surveys. This supports demand for higher-resolution streamer systems, ocean-bottom nodes, better source control, and more advanced onboard data acquisition/QC systems. Recent industry summaries also point to renewed offshore exploration, offshore wind, and CCS-related subsurface work as demand drivers for marine seismic acquisition.

Ocean Bottom Node equipment is becoming a major growth direction. OBN systems are

gaining importance because they can provide high-quality, full-azimuth seismic data in deepwater, congested fields, complex reservoirs, and areas where towed streamers are less effective. Recent projects show this shift clearly: TGS started a large-scale long-offset OBN campaign in the U.S. Gulf in 2026, while Shearwater announced Ghana's first deepwater OBN survey in late 2025. This trend supports demand for autonomous seabed nodes, node handling systems, deployment/retrieval vessels, acoustic positioning, batteries, and seabed data recording systems.

4D seismic and reservoir monitoring are increasing equipment specialization. Mature offshore fields require repeated seismic surveys to monitor fluid movement, reservoir pressure changes, and production performance. This is pushing demand for repeatable acquisition systems, high-stability nodes, precise positioning, and low-noise sensors. Sonardyne describes an "On-Demand Ocean Bottom Node" approach for deepwater 4D seismic monitoring in Brazil's pre-salt fields, highlighting the direction toward lower-cost, repeatable, and more automated reservoir surveillance.

Towed-streamer systems remain important, but the technology focus is shifting. Streamer equipment is still widely used for 2D and 3D marine seismic because it provides high acquisition productivity over large offshore areas. However, the market is moving toward wider bandwidth, better streamer steering, lower noise, multi-component sensing, improved source synchronization, and more accurate positioning. In practical terms, streamer suppliers need to improve not only the cable and hydrophone system, but also birds, tail buoys, depth control, navigation software, and real-time QC.

Digital processing, AI, and full-waveform inversion are changing equipment requirements. Marine seismic equipment is increasingly designed as part of a larger data chain, not just as hardware. Modern systems need cleaner low-frequency data, better sensor calibration, precise positioning, and richer metadata because advanced processing methods such as FWI, elastic inversion, and AI-assisted imaging depend heavily on high-quality acquisition data. A 2026 review notes that marine seismic is moving toward hybrid physics-driven and data-driven workflows, including FWI, elastic inversion, intelligent interpolation, and AI-based processing.

This report studies the global Marine Seismic Equipment demand, key companies, and key regions.

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

Highlights and key features of the study

Global Marine Seismic Equipment total market, 2021-2032, (USD Million)

Global Marine Seismic Equipment total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Marine Seismic Equipment total market, key domestic companies, and share, (USD Million)

Global Marine Seismic Equipment revenue by player, revenue and market share 2021-2026, (USD Million)

Global Marine Seismic Equipment total market by Type, CAGR, 2021-2032, (USD Million)

Global Marine Seismic Equipment total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Marine Seismic Equipment market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include PGS, CGG, Kongsberg, BGP, Shearwater GeoServices, Teledyne Marine, Aae Technologies, Mind Technology, Geo Marine Survey Systems, Guralp Systems, 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 Seismic Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Marine Seismic Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Marine Seismic Equipment Market, Segmentation by Type:

Sub-Bottom Profilers

Ocean Bottom Seismometers

Geophones and Hydrophone

Air and Water Guns

Other

Global Marine Seismic Equipment Market, Segmentation by Dimension:

2D

3D

4D

Global Marine Seismic Equipment Market, Segmentation by Equipment:

Data Acquisition Systems

Source Equipment

Other

Global Marine Seismic Equipment Market, Segmentation by Application:

Oil and Gas

Subsea Infrastructure

Other

Companies Profiled:

PGS

CGG

Kongsberg

BGP

Shearwater GeoServices

Teledyne Marine

Aae Technologies

Mind Technology

Geo Marine Survey Systems

Guralp Systems

General Acoustics

SIG France

Key Questions Answered

1. How big is the global Marine Seismic Equipment market?
2. What is the demand of the global Marine Seismic Equipment market?
3. What is the year over year growth of the global Marine Seismic Equipment market?
4. What is the total value of the global Marine Seismic Equipment market?
5. Who are the Major Players in the global Marine Seismic Equipment market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Marine Seismic Equipment Introduction
- 1.2 World Marine Seismic Equipment Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Marine Seismic Equipment Total Market by Region (by Headquarter Location)
 - 1.3.1 World Marine Seismic Equipment Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Marine Seismic Equipment Revenue (2021-2032)
 - 1.3.3 China Based Company Marine Seismic Equipment Revenue (2021-2032)
 - 1.3.4 Europe Based Company Marine Seismic Equipment Revenue (2021-2032)
 - 1.3.5 Japan Based Company Marine Seismic Equipment Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Marine Seismic Equipment Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Marine Seismic Equipment Revenue (2021-2032)
 - 1.3.8 India Based Company Marine Seismic Equipment Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Marine Seismic Equipment Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

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

3 WORLD MARINE SEISMIC EQUIPMENT COMPANIES COMPETITIVE ANALYSIS

- 3.1 World Marine Seismic Equipment Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global Marine Seismic Equipment Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for Marine Seismic Equipment in 2025

3.2.3 Global Concentration Ratios (CR8) for Marine Seismic Equipment in 2025

3.3 Marine Seismic Equipment Company Evaluation Quadrant

3.4 Marine Seismic Equipment Market: Overall Company Footprint Analysis

3.4.1 Marine Seismic Equipment Market: Region Footprint

3.4.2 Marine Seismic Equipment Market: Company Product Type Footprint

3.4.3 Marine Seismic Equipment Market: Company Product Application Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Marine Seismic Equipment Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: Marine Seismic Equipment Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: Marine Seismic Equipment Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: Marine Seismic Equipment Consumption Value Comparison

4.2.1 United States VS China: Marine Seismic Equipment Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Marine Seismic Equipment Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Marine Seismic Equipment Companies and Market Share, 2021-2026

4.3.1 United States Based Marine Seismic Equipment Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Marine Seismic Equipment Revenue, (2021-2026)

4.4 China Based Companies Marine Seismic Equipment Revenue and Market Share, 2021-2026

4.4.1 China Based Marine Seismic Equipment Companies, Company Headquarters

(Province, Country)

4.4.2 China Based Companies Marine Seismic Equipment Revenue, (2021-2026)

4.5 Rest of World Based Marine Seismic Equipment Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Marine Seismic Equipment Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Marine Seismic Equipment Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Marine Seismic Equipment Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Sub-Bottom Profilers

5.2.2 Ocean Bottom Seismometers

5.2.3 Geophones and Hydrophone

5.2.4 Air and Water Guns

5.2.5 Other

5.3 Market Segment by Type

5.3.1 World Marine Seismic Equipment Market Size by Type (2021-2026)

5.3.2 World Marine Seismic Equipment Market Size by Type (2027-2032)

5.3.3 World Marine Seismic Equipment Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY DIMENSION

6.1 World Marine Seismic Equipment Market Size Overview by Dimension: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Dimension

6.2.1 2D

6.2.2 3D

6.2.3 4D

6.3 Market Segment by Dimension

6.3.1 World Marine Seismic Equipment Market Size by Dimension (2021-2026)

6.3.2 World Marine Seismic Equipment Market Size by Dimension (2027-2032)

6.3.3 World Marine Seismic Equipment Market Size Market Share by Dimension (2027-2032)

7 MARKET ANALYSIS BY EQUIPMENT

7.1 World Marine Seismic Equipment Market Size Overview by Equipment: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Equipment

7.2.1 Data Acquisition Systems

7.2.2 Source Equipment

7.2.3 Other

7.3 Market Segment by Equipment

7.3.1 World Marine Seismic Equipment Market Size by Equipment (2021-2026)

7.3.2 World Marine Seismic Equipment Market Size by Equipment (2027-2032)

7.3.3 World Marine Seismic Equipment Market Size Market Share by Equipment (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Marine Seismic Equipment Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Oil and Gas

8.2.2 Subsea Infrastructure

8.2.3 Other

8.3 Market Segment by Application

8.3.1 World Marine Seismic Equipment Market Size by Application (2021-2026)

8.3.2 World Marine Seismic Equipment Market Size by Application (2027-2032)

8.3.3 World Marine Seismic Equipment Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 PGS

9.1.1 PGS Details

9.1.2 PGS Major Business

9.1.3 PGS Marine Seismic Equipment Product and Services

9.1.4 PGS Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)

9.1.5 PGS Recent Developments/Updates

9.1.6 PGS Competitive Strengths & Weaknesses

9.2 CGG

- 9.2.1 CGG Details
- 9.2.2 CGG Major Business
- 9.2.3 CGG Marine Seismic Equipment Product and Services
- 9.2.4 CGG Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)
- 9.2.5 CGG Recent Developments/Updates
- 9.2.6 CGG Competitive Strengths & Weaknesses
- 9.3 Kongsberg
 - 9.3.1 Kongsberg Details
 - 9.3.2 Kongsberg Major Business
 - 9.3.3 Kongsberg Marine Seismic Equipment Product and Services
 - 9.3.4 Kongsberg Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Kongsberg Recent Developments/Updates
 - 9.3.6 Kongsberg Competitive Strengths & Weaknesses
- 9.4 BGP
 - 9.4.1 BGP Details
 - 9.4.2 BGP Major Business
 - 9.4.3 BGP Marine Seismic Equipment Product and Services
 - 9.4.4 BGP Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)
 - 9.4.5 BGP Recent Developments/Updates
 - 9.4.6 BGP Competitive Strengths & Weaknesses
- 9.5 Shearwater GeoServices
 - 9.5.1 Shearwater GeoServices Details
 - 9.5.2 Shearwater GeoServices Major Business
 - 9.5.3 Shearwater GeoServices Marine Seismic Equipment Product and Services
 - 9.5.4 Shearwater GeoServices Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Shearwater GeoServices Recent Developments/Updates
 - 9.5.6 Shearwater GeoServices Competitive Strengths & Weaknesses
- 9.6 Teledyne Marine
 - 9.6.1 Teledyne Marine Details
 - 9.6.2 Teledyne Marine Major Business
 - 9.6.3 Teledyne Marine Marine Seismic Equipment Product and Services
 - 9.6.4 Teledyne Marine Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Teledyne Marine Recent Developments/Updates
 - 9.6.6 Teledyne Marine Competitive Strengths & Weaknesses

9.7 Aae Technologies

9.7.1 Aae Technologies Details

9.7.2 Aae Technologies Major Business

9.7.3 Aae Technologies Marine Seismic Equipment Product and Services

9.7.4 Aae Technologies Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)

9.7.5 Aae Technologies Recent Developments/Updates

9.7.6 Aae Technologies Competitive Strengths & Weaknesses

9.8 Mind Technology

9.8.1 Mind Technology Details

9.8.2 Mind Technology Major Business

9.8.3 Mind Technology Marine Seismic Equipment Product and Services

9.8.4 Mind Technology Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)

9.8.5 Mind Technology Recent Developments/Updates

9.8.6 Mind Technology Competitive Strengths & Weaknesses

9.9 Geo Marine Survey Systems

9.9.1 Geo Marine Survey Systems Details

9.9.2 Geo Marine Survey Systems Major Business

9.9.3 Geo Marine Survey Systems Marine Seismic Equipment Product and Services

9.9.4 Geo Marine Survey Systems Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)

9.9.5 Geo Marine Survey Systems Recent Developments/Updates

9.9.6 Geo Marine Survey Systems Competitive Strengths & Weaknesses

9.10 Guralp Systems

9.10.1 Guralp Systems Details

9.10.2 Guralp Systems Major Business

9.10.3 Guralp Systems Marine Seismic Equipment Product and Services

9.10.4 Guralp Systems Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)

9.10.5 Guralp Systems Recent Developments/Updates

9.10.6 Guralp Systems Competitive Strengths & Weaknesses

9.11 General Acoustics

9.11.1 General Acoustics Details

9.11.2 General Acoustics Major Business

9.11.3 General Acoustics Marine Seismic Equipment Product and Services

9.11.4 General Acoustics Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)

9.11.5 General Acoustics Recent Developments/Updates

9.11.6 General Acoustics Competitive Strengths & Weaknesses

9.12 SIG France

9.12.1 SIG France Details

9.12.2 SIG France Major Business

9.12.3 SIG France Marine Seismic Equipment Product and Services

9.12.4 SIG France Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026)

9.12.5 SIG France Recent Developments/Updates

9.12.6 SIG France Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Marine Seismic Equipment Industry Chain

10.2 Marine Seismic Equipment Upstream Analysis

10.3 Marine Seismic Equipment Midstream Analysis

10.4 Marine Seismic Equipment Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Marine Seismic Equipment Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Marine Seismic Equipment Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Marine Seismic Equipment Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Marine Seismic Equipment Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Marine Seismic Equipment Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Marine Seismic Equipment Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Marine Seismic Equipment Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Marine Seismic Equipment Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Marine Seismic Equipment Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Marine Seismic Equipment Players in 2025

Table 12. World Marine Seismic Equipment Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Marine Seismic Equipment Company Evaluation Quadrant

Table 14. Head Office of Key Marine Seismic Equipment Players

Table 15. Marine Seismic Equipment Market: Company Product Type Footprint

Table 16. Marine Seismic Equipment Market: Company Product Application Footprint

Table 17. Marine Seismic Equipment Mergers & Acquisitions Activity

Table 18. United States VS China Marine Seismic Equipment Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Marine Seismic Equipment Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Marine Seismic Equipment Companies, Headquarters (States, Country)

Table 21. United States Based Companies Marine Seismic Equipment Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Marine Seismic Equipment Revenue Market Share (2021-2026)

Table 23. China Based Marine Seismic Equipment Companies, Headquarters (Province, Country)

Table 24. China Based Companies Marine Seismic Equipment Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Marine Seismic Equipment Revenue Market Share (2021-2026)

Table 26. Rest of World Based Marine Seismic Equipment Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Marine Seismic Equipment Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Marine Seismic Equipment Revenue Market Share (2021-2026)

Table 29. World Marine Seismic Equipment Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Marine Seismic Equipment Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Marine Seismic Equipment Market Size by Type (2027-2032) & (USD Million)

Table 32. World Marine Seismic Equipment Market Size by Dimension, (USD Million), 2021 & 2025 & 2032

Table 33. World Marine Seismic Equipment Market Size Value by Dimension (2021-2026) & (USD Million)

Table 34. World Marine Seismic Equipment Market Size by Dimension (2027-2032) & (USD Million)

Table 35. World Marine Seismic Equipment Market Size by Equipment, (USD Million), 2021 & 2025 & 2032

Table 36. World Marine Seismic Equipment Market Size Value by Equipment (2021-2026) & (USD Million)

Table 37. World Marine Seismic Equipment Market Size by Equipment (2027-2032) & (USD Million)

Table 38. World Marine Seismic Equipment Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Marine Seismic Equipment Market Size by Application (2021-2026) & (USD Million)

Table 40. World Marine Seismic Equipment Market Size by Application (2027-2032) & (USD Million)

Table 41. PGS Basic Information, Manufacturing Base and Competitors

Table 42. PGS Major Business

Table 43. PGS Marine Seismic Equipment Product and Services

Table 44. PGS Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. PGS Recent Developments/Updates

Table 46. PGS Competitive Strengths & Weaknesses

Table 47. CGG Basic Information, Manufacturing Base and Competitors

Table 48. CGG Major Business

Table 49. CGG Marine Seismic Equipment Product and Services

Table 50. CGG Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 51. CGG Recent Developments/Updates

Table 52. CGG Competitive Strengths & Weaknesses

Table 53. Kongsberg Basic Information, Manufacturing Base and Competitors

Table 54. Kongsberg Major Business

Table 55. Kongsberg Marine Seismic Equipment Product and Services

Table 56. Kongsberg Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. Kongsberg Recent Developments/Updates

Table 58. Kongsberg Competitive Strengths & Weaknesses

Table 59. BGP Basic Information, Manufacturing Base and Competitors

Table 60. BGP Major Business

Table 61. BGP Marine Seismic Equipment Product and Services

Table 62. BGP Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. BGP Recent Developments/Updates

Table 64. BGP Competitive Strengths & Weaknesses

Table 65. Shearwater GeoServices Basic Information, Manufacturing Base and Competitors

Table 66. Shearwater GeoServices Major Business

Table 67. Shearwater GeoServices Marine Seismic Equipment Product and Services

Table 68. Shearwater GeoServices Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 69. Shearwater GeoServices Recent Developments/Updates

Table 70. Shearwater GeoServices Competitive Strengths & Weaknesses

Table 71. Teledyne Marine Basic Information, Manufacturing Base and Competitors

Table 72. Teledyne Marine Major Business

Table 73. Teledyne Marine Marine Seismic Equipment Product and Services

Table 74. Teledyne Marine Marine Seismic Equipment Revenue, Gross Margin and

Market Share (2021-2026) & (USD Million)

Table 75. Teledyne Marine Recent Developments/Updates

Table 76. Teledyne Marine Competitive Strengths & Weaknesses

Table 77. Aae Technologies Basic Information, Manufacturing Base and Competitors

Table 78. Aae Technologies Major Business

Table 79. Aae Technologies Marine Seismic Equipment Product and Services

Table 80. Aae Technologies Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 81. Aae Technologies Recent Developments/Updates

Table 82. Aae Technologies Competitive Strengths & Weaknesses

Table 83. Mind Technology Basic Information, Manufacturing Base and Competitors

Table 84. Mind Technology Major Business

Table 85. Mind Technology Marine Seismic Equipment Product and Services

Table 86. Mind Technology Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 87. Mind Technology Recent Developments/Updates

Table 88. Mind Technology Competitive Strengths & Weaknesses

Table 89. Geo Marine Survey Systems Basic Information, Manufacturing Base and Competitors

Table 90. Geo Marine Survey Systems Major Business

Table 91. Geo Marine Survey Systems Marine Seismic Equipment Product and Services

Table 92. Geo Marine Survey Systems Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 93. Geo Marine Survey Systems Recent Developments/Updates

Table 94. Geo Marine Survey Systems Competitive Strengths & Weaknesses

Table 95. Guralp Systems Basic Information, Manufacturing Base and Competitors

Table 96. Guralp Systems Major Business

Table 97. Guralp Systems Marine Seismic Equipment Product and Services

Table 98. Guralp Systems Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 99. Guralp Systems Recent Developments/Updates

Table 100. Guralp Systems Competitive Strengths & Weaknesses

Table 101. General Acoustics Basic Information, Manufacturing Base and Competitors

Table 102. General Acoustics Major Business

Table 103. General Acoustics Marine Seismic Equipment Product and Services

Table 104. General Acoustics Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 105. General Acoustics Recent Developments/Updates

Table 106. General Acoustics Competitive Strengths & Weaknesses

Table 107. SIG France Basic Information, Manufacturing Base and Competitors

Table 108. SIG France Major Business

Table 109. SIG France Marine Seismic Equipment Product and Services

Table 110. SIG France Marine Seismic Equipment Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 111. SIG France Recent Developments/Updates

Table 112. SIG France Competitive Strengths & Weaknesses

Table 113. Global Key Players of Marine Seismic Equipment Upstream (Raw Materials)

Table 114. Global Marine Seismic Equipment Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Marine Seismic Equipment Picture

Figure 2. World Marine Seismic Equipment Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Marine Seismic Equipment Total Revenue (2021-2032) & (USD Million)

Figure 4. World Marine Seismic Equipment Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Marine Seismic Equipment Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Marine Seismic Equipment Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Marine Seismic Equipment Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Marine Seismic Equipment Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Marine Seismic Equipment Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Marine Seismic Equipment Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Marine Seismic Equipment Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Marine Seismic Equipment Revenue (2021-2032) & (USD Million)

Figure 13. Marine Seismic Equipment Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Marine Seismic Equipment Consumption Value (2021-2032) & (USD Million)

Figure 16. World Marine Seismic Equipment Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Marine Seismic Equipment Consumption Value (2021-2032) & (USD Million)

Figure 18. China Marine Seismic Equipment Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Marine Seismic Equipment Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Marine Seismic Equipment Consumption Value (2021-2032) & (USD Million)

Million)

Figure 21. South Korea Marine Seismic Equipment Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Marine Seismic Equipment Consumption Value (2021-2032) & (USD Million)

Figure 23. India Marine Seismic Equipment Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Marine Seismic Equipment by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Marine Seismic Equipment Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Marine Seismic Equipment Markets in 2025

Figure 27. United States VS China: Marine Seismic Equipment Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Marine Seismic Equipment Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Marine Seismic Equipment Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Marine Seismic Equipment Market Size Market Share by Type in 2025

Figure 31. Sub-Bottom Profilers

Figure 32. Ocean Bottom Seismometers

Figure 33. Geophones and Hydrophone

Figure 34. Air and Water Guns

Figure 35. Other

Figure 36. World Marine Seismic Equipment Market Size Market Share by Type (2021-2032)

Figure 37. World Marine Seismic Equipment Market Size by Dimension, (USD Million), 2021 & 2025 & 2032

Figure 38. World Marine Seismic Equipment Market Size Market Share by Dimension in 2025

Figure 39. 2D

Figure 40. 3D

Figure 41. 4D

Figure 42. World Marine Seismic Equipment Market Size Market Share by Dimension (2021-2032)

Figure 43. World Marine Seismic Equipment Market Size by Equipment, (USD Million), 2021 & 2025 & 2032

Figure 44. World Marine Seismic Equipment Market Size Market Share by Equipment in

2025

Figure 45. Data Acquisition Systems

Figure 46. Source Equipment

Figure 47. Other

Figure 48. World Marine Seismic Equipment Market Size Market Share by Equipment (2021-2032)

Figure 49. World Marine Seismic Equipment Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 50. World Marine Seismic Equipment Market Size Market Share by Application in 2025

Figure 51. Oil and Gas

Figure 52. Subsea Infrastructure

Figure 53. Other

Figure 54. World Marine Seismic Equipment Market Size Market Share by Application (2021-2032)

Figure 55. Marine Seismic Equipment Industrial Chain

Figure 56. Methodology

Figure 57. Research Process and Data Source

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