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Global Ultra-Short Baseline Hydroacoustic Positioning System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Ultra-Short Baseline Hydroacoustic Positioning System market size is expected to reach $ 1290 million by 2032, rising at a market growth of 8.4% CAGR during the forecast period (2026-2032).

In 2025, the global production of ultra-short baseline systems reached 26,100 units, with an average price of approximately US$28,500 per unit.

An ultra-short baseline (USBR) system consists of a shipboard component and an underwater transponder. The shipboard component includes a signal processing unit, a transducer array, and peripheral auxiliary sensors (such as GNSS and attitude sensors). The signal processing unit acts as the control system, responsible for its operation. The shipboard acoustic transducer array is installed on the bottom or sides of the ship and consists of a central transmitting transducer and multiple surrounding hydrophones. The underwater component mainly refers to the transponder; if operating in a synchronized clock-triggered mode, a synchronized clock is also required. The transmitting transducer emits an acoustic signal, which is received by the hydrophones. When the underwater transponder receives the signal from the transmitting transducer, it emits a response signal, which is received by the hydrophones. By calculating the time and phase differences between the signals received by the hydrophones at different intervals, the precise location of the underwater transponder is obtained. Typically, the USBR transponder is installed on the back of the underwater hull, and its hemispherical directivity covers the entire upper space, ensuring the USBR positioning system functions correctly at various depths and inclinations underwater.

The global military and security landscape is driving the modernization of navies,

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submarines, and anti-submarine networks, making underwater acoustic communication and positioning key technologies. For example, the United States, Singapore, and Japan have invested in large-scale anti-submarine and maritime surveillance projects; China has also emphasized its ?maritime power? strategy, leading to increased demand for deep-sea equipment. Simultaneously, civilian sectors such as offshore oil and gas extraction and offshore wind power are increasing their demand for long-range underwater communication, creating a dual market for defense and industry.

Defense strategies and industrial expansion provide substantial funding and project demands, driving the development of high-performance underwater acoustic systems. With ?networked anti-submarine warfare? as the goal, the technological approach leans towards multi-node collaborative networks (AUV, ship, and buoy cooperation); resource development scenarios emphasize high-bandwidth and pressure- and corrosion-resistant equipment.

Military applications include submarine communication, underwater target location, and unmanned surface vessel (USV) swarm operations; civilian applications include seabed exploration, pipeline inspection, environmental monitoring, and scientific research. Demanders include the Navy, Ministry of National Defense, offshore oil companies, marine research institutes, and environmental protection agencies.

The recent expansion of the global marine economy has significantly increased the demand for underwater acoustic systems. The industry has developed a relatively complete product chain, including commercial underwater acoustic modems (Evologics, LinkQuest, etc.), high-precision sonar positioning systems (Sonardyne, L3), autonomous underwater vehicles (ASV, ROV), and platform integration solutions. China's manned submersible projects such as the ?Jiaolong? and ?Fendouzhe? have driven the development of deep-sea communication prototypes (reaching 10kbps at a depth of 5000m). The defense sector has the strongest demand, with navies worldwide increasing investment to improve their anti-submarine communication networks. The oil and gas and new energy (offshore wind power) industries also have a growing demand for long-endurance, broadband communication. The civilian market, including environmental monitoring and marine scientific research, has significant potential. Consumer applications, such as recreational underwater communication, are still in their early stages.

Many countries have introduced policies to support the underwater acoustic industry. Europe and the United States have mature industrial ecosystems, with companies

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including Teledyne Marine, Thales Underwater Systems, Kongsberg, and Subsea 7. China has also seen the emergence of a number of aerospace and marine technology companies and research institutes specializing in underwater acoustics, forming a relatively complete R&D and production system. In the commercial sector, underwater acoustic technology has been adopted in seabed observation networks and networked oil and gas operations, driving large-scale applications.

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 in the market is severe, making it difficult to scale up niche applications; simultaneously, the harsh marine environment leads to high costs for equipment maintenance and upgrades. Regarding policy risks, environmental regulations (noise pollution) and maritime sovereignty restrictions limiting cross-border communication deployment need to be considered.

This report studies the global Ultra-Short Baseline Hydroacoustic Positioning System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Ultra-Short Baseline Hydroacoustic Positioning 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 Ultra-Short Baseline Hydroacoustic Positioning System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Ultra-Short Baseline Hydroacoustic Positioning System total production and demand, 2021-2032, (Units)
Global Ultra-Short Baseline Hydroacoustic Positioning System total production value, 2021-2032, (USD Million)
Global Ultra-Short Baseline Hydroacoustic Positioning System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Ultra-Short Baseline Hydroacoustic Positioning System consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Ultra-Short Baseline Hydroacoustic Positioning System domestic production, consumption, key domestic manufacturers and share

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Global Ultra-Short Baseline Hydroacoustic Positioning System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global Ultra-Short Baseline Hydroacoustic Positioning System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global Ultra-Short Baseline Hydroacoustic Positioning System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Ultra-Short Baseline Hydroacoustic Positioning 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 Advanced Navigation, Exail, Sonardyne, EvoLogics, LinkQuest, Jiaxing Zhongke Acoustics Technology, China Haida, Harbin Engineering University, Blueprint Design, The 715th Research Institute of China State Shipbuilding Corporation Limited, 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 Ultra-Short Baseline Hydroacoustic Positioning System 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 Ultra-Short Baseline Hydroacoustic Positioning System Market, By Region:

United States

China

Europe

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Japan

South Korea

ASEAN

India

Rest of World

Global Ultra-Short Baseline Hydroacoustic Positioning System Market, Segmentation by Type:

Underwater Acoustic Positioning Beacon

Underwater Acoustic Positioning Base Station

Global Ultra-Short Baseline Hydroacoustic Positioning System Market, Segmentation by Deployment Method:

Underwater Engineering Equipment

Underwater Robots

Seabed Observation Network

Others

Global Ultra-Short Baseline Hydroacoustic Positioning System Market, Segmentation by Positioning Distance:

? 3km

?3km

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Global Ultra-Short Baseline Hydroacoustic Positioning System Market, Segmentation by Application:

Military

Industrial

Consumer

Companies Profiled:

Advanced Navigation

Exail

Sonardyne

EvoLogics

LinkQuest

Jiaxing Zhongke Acoustics Technology

China Haida

Harbin Engineering University

Blueprint Design

The 715th Research Institute of China State Shipbuilding Corporation Limited

Shenzhen Smart Ocean Technology

Whale Wave Technology

Shenzhen Zhilan Technology

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Key Questions Answered:

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

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