

Global Underwater Acoustic Communication Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Underwater Acoustic Communication market size is expected to reach \$ 1425 million by 2032, rising at a market growth of 4.4% CAGR during the forecast period (2026-2032).

Underwater acoustic communication is a type of wireless communication technology that utilizes sound waves in the aquatic medium as information carriers to facilitate data transmission, information exchange, and remote control in underwater environments. Because electromagnetic waves attenuate severely in seawater—preventing them from propagating as effectively as they do in air—underwater acoustic communication relies primarily on the propagation characteristics of sound waves. It employs underwater acoustic transducers to convert between electrical and acoustic signals and integrates techniques such as modulation/demodulation, channel coding, equalization, and multiple access to enable data transmission among submarines, unmanned underwater vehicles (UUVs), ocean sensor networks, marine observation equipment, and underwater robots.

Typically operating within the low-frequency to medium-high-frequency acoustic ranges (approximately several hundred Hz to several hundred kHz), underwater acoustic communication offers advantages such as long-range propagation and broad coverage. However, the complexity of the underwater environment presents significant technical challenges, including limited bandwidth, high propagation latency, pronounced multipath effects, strong channel time-variability, and severe noise interference. With the ongoing development of marine resource exploitation, deep-sea exploration, maritime security, unmanned systems, and the underwater Internet of Things (IoT), underwater acoustic communication has become a crucial foundational technology for connecting underwater equipment with marine information systems.

Industry Trends

The underwater acoustic communication industry is evolving towards high data rates, low power consumption, and intelligent networking. Traditional point-to-point communication models are gradually shifting to multi-node underwater acoustic networks to meet the demands of emerging applications such as autonomous underwater vehicles (AUVs), underwater sensor networks, and the marine Internet of Things (IoT). Advances in adaptive modulation, underwater acoustic signal processing, software-defined communication, and AI-driven channel optimization are continuously enhancing the reliability of underwater acoustic communication systems in complex marine environments. Meanwhile, customer demand is shifting from standalone communication devices to integrated underwater systems that combine positioning, sensing, navigation, and communication capabilities.

Market Dynamics

Driving Factors

The continuous development of AUVs, unmanned underwater vehicles (UUVs), marine monitoring systems, and marine engineering equipment is driving the demand for stable and reliable underwater communication technologies. Activities such as deep-sea exploration, marine resource development, maritime security, and the construction of "smart oceans" are expanding the application scope of underwater data transmission systems. Furthermore, increased investment by various nations in ocean observation infrastructure and marine technology R&D provides a foundation for the long-term growth of the underwater acoustic communication industry.

Limiting Factors

Underwater acoustic communication is constrained by the complexity of the underwater propagation environment, facing challenges such as limited bandwidth, high propagation latency, significant multipath effects, and rapid channel fluctuations. Compared to terrestrial wireless communication technologies, underwater acoustic communication systems typically require more complex signal processing techniques and higher engineering development investment. Additionally, variations in water temperature, salinity, currents, and ambient noise can impact communication stability and system performance.

Market Opportunities

The development of underwater robots, underwater sensor networks, and intelligent marine monitoring platforms presents new market opportunities for underwater acoustic communication enterprises. Future growth is expected to be driven by areas such as the underwater IoT, collaborative operations involving multiple underwater robots, and long-range deep-sea communication. Moreover, the integration of underwater acoustic communication with navigation, positioning, and sensing technologies will further enhance the application value and commercial potential of these systems.

Industry Risks and Challenges

The underwater acoustic communication industry faces challenges regarding technical standardization, interoperability between different systems, and large-scale commercial deployment. Compared to mature terrestrial communication systems, underwater acoustic communication requires further refinement in areas such as network protocols, energy efficiency, and cost optimization. At the same time, the development of alternative underwater communication technologies may influence technology selection in specific application scenarios.

Industry Chain Analysis

The underwater acoustic communication industry chain comprises upstream acoustic components, electronic parts, signal processing technologies, and specialized underwater materials; midstream enterprises handle the R&D and manufacturing of underwater acoustic modems, communication nodes, and integrated communication systems; and downstream applications span defense equipment, marine research platforms, underwater robots, marine engineering systems, and ocean monitoring networks. Industry value is primarily concentrated in underwater acoustic communication algorithms, signal processing capabilities, system integration technologies, and reliability design for complex environments. Given the highly complex nature of the underwater environment, companies possessing extensive engineering experience and system integration capabilities hold a competitive advantage in high-end application sectors.

Downstream Market Opportunities

Downstream demand for underwater acoustic communication stems primarily from sectors such as defense and the military, marine research, underwater robotics, marine

engineering, and underwater monitoring. Defense applications prioritize communication reliability, security, and anti-interference capabilities, whereas the commercial market focuses more on applications involving autonomous underwater vehicles (AUVs), marine infrastructure maintenance, and marine environmental monitoring. As the digitalization of the ocean and the development of "smart oceans" progress, the demand for networked underwater systems is expected to continue expanding.

Regional Analysis

The global underwater acoustic communication market is concentrated in regions characterized by strong marine technology R&D capabilities, significant defense investment, and a solid foundation in marine engineering. North America and Europe maintain a prominent position in high-end underwater acoustic communication equipment and marine technology solutions, backed by mature R&D ecosystems and industrial infrastructure. The Asia-Pacific region is emerging as a key growth area, driven by increased investment in marine resource development, ocean observation, underwater robotics, and marine infrastructure construction. Future regional competition will be shaped by local manufacturing capabilities, defense requirements, and strategies for marine technology development.

Report Scope

This report studies the global Underwater Acoustic Communication demand, key companies, and key regions.

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

Highlights and key features of the study

Global Underwater Acoustic Communication total market, 2021-2032, (USD Million)

Global Underwater Acoustic Communication total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Underwater Acoustic Communication total market, key domestic companies, and share, (USD Million)

Global Underwater Acoustic Communication revenue by player, revenue and market share 2021-2026, (USD Million)

Global Underwater Acoustic Communication total market by Type, CAGR, 2021-2032, (USD Million)

Global Underwater Acoustic Communication total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Underwater Acoustic Communication 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 Teledyne Marine, Sonardyne, Thales, Kongsberg Discovery, Ultra Electronics, Mistral Solutions, Aquatec Group, L3Harris, Tritech, Nortek, 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 Underwater Acoustic Communication 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 Underwater Acoustic Communication Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Underwater Acoustic Communication Market, Segmentation by Type:

Modem

Hydrophones

Others

Global Underwater Acoustic Communication Market, Segmentation by Communication Range:

≤1 km

1–10 km

≥10 km

Global Underwater Acoustic Communication Market, Segmentation by Operating Frequency:

≤10 kHz

10–100 kHz

?100 kHz

Global Underwater Acoustic Communication Market, Segmentation by Application:

Military Surveillance

Underwater Monitoring

Underwater Biological Studies

Others

Companies Profiled:

Teledyne Marine

Sonardyne

Thales

Kongsberg Discovery

Ultra Electronics

Mistral Solutions

Aquatec Group

L3Harris

Tritech

Nortek

EvoLogics

LinkQuest

WHOI

Hydroacoustic

715 Research Institute of China State Shipbuilding Corporation (CSSC)

Institute of Acoustics, Chinese Academy of Sciences (IACAS)

Haidiying Deep-Sea Technology

Beijing Great Wall Electronic Equipment

Shenzhen Smart Ocean Technology

Haiying Jiake

Key Questions Answered

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World Underwater Acoustic Communication Consumption Value (2021-2032)
- 2.2 World Underwater Acoustic Communication Consumption Value by Region
 - 2.2.1 World Underwater Acoustic Communication Consumption Value by Region (2021-2026)
 - 2.2.2 World Underwater Acoustic Communication Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Underwater Acoustic Communication Consumption Value

(2021-2032)

2.4 China Underwater Acoustic Communication Consumption Value (2021-2032)

2.5 Europe Underwater Acoustic Communication Consumption Value (2021-2032)

2.6 Japan Underwater Acoustic Communication Consumption Value (2021-2032)

2.7 South Korea Underwater Acoustic Communication Consumption Value (2021-2032)

2.8 ASEAN Underwater Acoustic Communication Consumption Value (2021-2032)

2.9 India Underwater Acoustic Communication Consumption Value (2021-2032)

3 WORLD UNDERWATER ACOUSTIC COMMUNICATION COMPANIES COMPETITIVE ANALYSIS

3.1 World Underwater Acoustic Communication Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global Underwater Acoustic Communication Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for Underwater Acoustic Communication in 2025

3.2.3 Global Concentration Ratios (CR8) for Underwater Acoustic Communication in 2025

3.3 Underwater Acoustic Communication Company Evaluation Quadrant

3.4 Underwater Acoustic Communication Market: Overall Company Footprint Analysis

3.4.1 Underwater Acoustic Communication Market: Region Footprint

3.4.2 Underwater Acoustic Communication Market: Company Product Type Footprint

3.4.3 Underwater Acoustic Communication 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: Underwater Acoustic Communication Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: Underwater Acoustic Communication Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: Underwater Acoustic Communication Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: Underwater Acoustic Communication Consumption Value Comparison

4.2.1 United States VS China: Underwater Acoustic Communication Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Underwater Acoustic Communication Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Underwater Acoustic Communication Companies and Market Share, 2021-2026

4.3.1 United States Based Underwater Acoustic Communication Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Underwater Acoustic Communication Revenue, (2021-2026)

4.4 China Based Companies Underwater Acoustic Communication Revenue and Market Share, 2021-2026

4.4.1 China Based Underwater Acoustic Communication Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Underwater Acoustic Communication Revenue, (2021-2026)

4.5 Rest of World Based Underwater Acoustic Communication Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Underwater Acoustic Communication Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Underwater Acoustic Communication Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Underwater Acoustic Communication Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Modem

5.2.2 Hydrophones

5.2.3 Others

5.3 Market Segment by Type

5.3.1 World Underwater Acoustic Communication Market Size by Type (2021-2026)

5.3.2 World Underwater Acoustic Communication Market Size by Type (2027-2032)

5.3.3 World Underwater Acoustic Communication Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY COMMUNICATION RANGE

6.1 World Underwater Acoustic Communication Market Size Overview by Communication Range: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Communication Range

6.2.1 ?1 km

6.2.2 1–10 km

6.2.3 ?10 km

6.3 Market Segment by Communication Range

6.3.1 World Underwater Acoustic Communication Market Size by Communication Range (2021-2026)

6.3.2 World Underwater Acoustic Communication Market Size by Communication Range (2027-2032)

6.3.3 World Underwater Acoustic Communication Market Size Market Share by Communication Range (2027-2032)

7 MARKET ANALYSIS BY OPERATING FREQUENCY

7.1 World Underwater Acoustic Communication Market Size Overview by Operating Frequency: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Operating Frequency

7.2.1 ?10 kHz

7.2.2 10–100 kHz

7.2.3 ?100 kHz

7.3 Market Segment by Operating Frequency

7.3.1 World Underwater Acoustic Communication Market Size by Operating Frequency (2021-2026)

7.3.2 World Underwater Acoustic Communication Market Size by Operating Frequency (2027-2032)

7.3.3 World Underwater Acoustic Communication Market Size Market Share by Operating Frequency (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Underwater Acoustic Communication Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Military Surveillance

8.2.2 Underwater Monitoring

8.2.3 Underwater Biological Studies

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Underwater Acoustic Communication Market Size by Application
(2021-2026)

8.3.2 World Underwater Acoustic Communication Market Size by Application
(2027-2032)

8.3.3 World Underwater Acoustic Communication Market Size Market Share by
Application (2021-2032)

9 COMPANY PROFILES

9.1 Teledyne Marine

9.1.1 Teledyne Marine Details

9.1.2 Teledyne Marine Major Business

9.1.3 Teledyne Marine Underwater Acoustic Communication Product and Services

9.1.4 Teledyne Marine Underwater Acoustic Communication Revenue, Gross Margin
and Market Share (2021-2026)

9.1.5 Teledyne Marine Recent Developments/Updates

9.1.6 Teledyne Marine Competitive Strengths & Weaknesses

9.2 Sonardyne

9.2.1 Sonardyne Details

9.2.2 Sonardyne Major Business

9.2.3 Sonardyne Underwater Acoustic Communication Product and Services

9.2.4 Sonardyne Underwater Acoustic Communication Revenue, Gross Margin and
Market Share (2021-2026)

9.2.5 Sonardyne Recent Developments/Updates

9.2.6 Sonardyne Competitive Strengths & Weaknesses

9.3 Thales

9.3.1 Thales Details

9.3.2 Thales Major Business

9.3.3 Thales Underwater Acoustic Communication Product and Services

9.3.4 Thales Underwater Acoustic Communication Revenue, Gross Margin and Market
Share (2021-2026)

9.3.5 Thales Recent Developments/Updates

9.3.6 Thales Competitive Strengths & Weaknesses

9.4 Kongsberg Discovery

9.4.1 Kongsberg Discovery Details

9.4.2 Kongsberg Discovery Major Business

9.4.3 Kongsberg Discovery Underwater Acoustic Communication Product and Services

9.4.4 Kongsberg Discovery Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)

9.4.5 Kongsberg Discovery Recent Developments/Updates

9.4.6 Kongsberg Discovery Competitive Strengths & Weaknesses

9.5 Ultra Electronics

9.5.1 Ultra Electronics Details

9.5.2 Ultra Electronics Major Business

9.5.3 Ultra Electronics Underwater Acoustic Communication Product and Services

9.5.4 Ultra Electronics Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)

9.5.5 Ultra Electronics Recent Developments/Updates

9.5.6 Ultra Electronics Competitive Strengths & Weaknesses

9.6 Mistral Solutions

9.6.1 Mistral Solutions Details

9.6.2 Mistral Solutions Major Business

9.6.3 Mistral Solutions Underwater Acoustic Communication Product and Services

9.6.4 Mistral Solutions Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)

9.6.5 Mistral Solutions Recent Developments/Updates

9.6.6 Mistral Solutions Competitive Strengths & Weaknesses

9.7 Aquatec Group

9.7.1 Aquatec Group Details

9.7.2 Aquatec Group Major Business

9.7.3 Aquatec Group Underwater Acoustic Communication Product and Services

9.7.4 Aquatec Group Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)

9.7.5 Aquatec Group Recent Developments/Updates

9.7.6 Aquatec Group Competitive Strengths & Weaknesses

9.8 L3Harris

9.8.1 L3Harris Details

9.8.2 L3Harris Major Business

9.8.3 L3Harris Underwater Acoustic Communication Product and Services

9.8.4 L3Harris Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)

9.8.5 L3Harris Recent Developments/Updates

9.8.6 L3Harris Competitive Strengths & Weaknesses

9.9 Tritech

- 9.9.1 Trittech Details
- 9.9.2 Trittech Major Business
- 9.9.3 Trittech Underwater Acoustic Communication Product and Services
- 9.9.4 Trittech Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)
- 9.9.5 Trittech Recent Developments/Updates
- 9.9.6 Trittech Competitive Strengths & Weaknesses
- 9.10 Nortek
 - 9.10.1 Nortek Details
 - 9.10.2 Nortek Major Business
 - 9.10.3 Nortek Underwater Acoustic Communication Product and Services
 - 9.10.4 Nortek Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Nortek Recent Developments/Updates
 - 9.10.6 Nortek Competitive Strengths & Weaknesses
- 9.11 EvoLogics
 - 9.11.1 EvoLogics Details
 - 9.11.2 EvoLogics Major Business
 - 9.11.3 EvoLogics Underwater Acoustic Communication Product and Services
 - 9.11.4 EvoLogics Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)
 - 9.11.5 EvoLogics Recent Developments/Updates
 - 9.11.6 EvoLogics Competitive Strengths & Weaknesses
- 9.12 LinkQuest
 - 9.12.1 LinkQuest Details
 - 9.12.2 LinkQuest Major Business
 - 9.12.3 LinkQuest Underwater Acoustic Communication Product and Services
 - 9.12.4 LinkQuest Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)
 - 9.12.5 LinkQuest Recent Developments/Updates
 - 9.12.6 LinkQuest Competitive Strengths & Weaknesses
- 9.13 WHOI
 - 9.13.1 WHOI Details
 - 9.13.2 WHOI Major Business
 - 9.13.3 WHOI Underwater Acoustic Communication Product and Services
 - 9.13.4 WHOI Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)
 - 9.13.5 WHOI Recent Developments/Updates
 - 9.13.6 WHOI Competitive Strengths & Weaknesses

9.14 Hydroacoustic

9.14.1 Hydroacoustic Details

9.14.2 Hydroacoustic Major Business

9.14.3 Hydroacoustic Underwater Acoustic Communication Product and Services

9.14.4 Hydroacoustic Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)

9.14.5 Hydroacoustic Recent Developments/Updates

9.14.6 Hydroacoustic Competitive Strengths & Weaknesses

9.15 715 Research Institute of China State Shipbuilding Corporation (CSSC)

9.15.1 715 Research Institute of China State Shipbuilding Corporation (CSSC) Details

9.15.2 715 Research Institute of China State Shipbuilding Corporation (CSSC) Major Business

9.15.3 715 Research Institute of China State Shipbuilding Corporation (CSSC) Underwater Acoustic Communication Product and Services

9.15.4 715 Research Institute of China State Shipbuilding Corporation (CSSC) Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)

9.15.5 715 Research Institute of China State Shipbuilding Corporation (CSSC) Recent Developments/Updates

9.15.6 715 Research Institute of China State Shipbuilding Corporation (CSSC) Competitive Strengths & Weaknesses

9.16 Institute of Acoustics, Chinese Academy of Sciences (IACAS)

9.16.1 Institute of Acoustics, Chinese Academy of Sciences (IACAS) Details

9.16.2 Institute of Acoustics, Chinese Academy of Sciences (IACAS) Major Business

9.16.3 Institute of Acoustics, Chinese Academy of Sciences (IACAS) Underwater Acoustic Communication Product and Services

9.16.4 Institute of Acoustics, Chinese Academy of Sciences (IACAS) Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)

9.16.5 Institute of Acoustics, Chinese Academy of Sciences (IACAS) Recent Developments/Updates

9.16.6 Institute of Acoustics, Chinese Academy of Sciences (IACAS) Competitive Strengths & Weaknesses

9.17 Haidiying Deep-Sea Technology

9.17.1 Haidiying Deep-Sea Technology Details

9.17.2 Haidiying Deep-Sea Technology Major Business

9.17.3 Haidiying Deep-Sea Technology Underwater Acoustic Communication Product and Services

9.17.4 Haidiying Deep-Sea Technology Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)

- 9.17.5 Haidiying Deep-Sea Technology Recent Developments/Updates
- 9.17.6 Haidiying Deep-Sea Technology Competitive Strengths & Weaknesses
- 9.18 Beijing Great Wall Electronic Equipment
 - 9.18.1 Beijing Great Wall Electronic Equipment Details
 - 9.18.2 Beijing Great Wall Electronic Equipment Major Business
 - 9.18.3 Beijing Great Wall Electronic Equipment Underwater Acoustic Communication Product and Services
 - 9.18.4 Beijing Great Wall Electronic Equipment Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)
 - 9.18.5 Beijing Great Wall Electronic Equipment Recent Developments/Updates
 - 9.18.6 Beijing Great Wall Electronic Equipment Competitive Strengths & Weaknesses
- 9.19 Shenzhen Smart Ocean Technology
 - 9.19.1 Shenzhen Smart Ocean Technology Details
 - 9.19.2 Shenzhen Smart Ocean Technology Major Business
 - 9.19.3 Shenzhen Smart Ocean Technology Underwater Acoustic Communication Product and Services
 - 9.19.4 Shenzhen Smart Ocean Technology Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)
 - 9.19.5 Shenzhen Smart Ocean Technology Recent Developments/Updates
 - 9.19.6 Shenzhen Smart Ocean Technology Competitive Strengths & Weaknesses
- 9.20 Haiying Jiake
 - 9.20.1 Haiying Jiake Details
 - 9.20.2 Haiying Jiake Major Business
 - 9.20.3 Haiying Jiake Underwater Acoustic Communication Product and Services
 - 9.20.4 Haiying Jiake Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026)
 - 9.20.5 Haiying Jiake Recent Developments/Updates
 - 9.20.6 Haiying Jiake Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Underwater Acoustic Communication Industry Chain
- 10.2 Underwater Acoustic Communication Upstream Analysis
- 10.3 Underwater Acoustic Communication Midstream Analysis
- 10.4 Underwater Acoustic Communication 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 Underwater Acoustic Communication Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Underwater Acoustic Communication Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Underwater Acoustic Communication Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Underwater Acoustic Communication Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Underwater Acoustic Communication Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Underwater Acoustic Communication Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Underwater Acoustic Communication Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Underwater Acoustic Communication Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Underwater Acoustic Communication Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Underwater Acoustic Communication Players in 2025

Table 12. World Underwater Acoustic Communication Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Underwater Acoustic Communication Company Evaluation Quadrant

Table 14. Head Office of Key Underwater Acoustic Communication Players

Table 15. Underwater Acoustic Communication Market: Company Product Type Footprint

Table 16. Underwater Acoustic Communication Market: Company Product Application Footprint

Table 17. Underwater Acoustic Communication Mergers & Acquisitions Activity

Table 18. United States VS China Underwater Acoustic Communication Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Underwater Acoustic Communication Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Underwater Acoustic Communication Companies,

Headquarters (States, Country)

Table 21. United States Based Companies Underwater Acoustic Communication Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Underwater Acoustic Communication Revenue Market Share (2021-2026)

Table 23. China Based Underwater Acoustic Communication Companies, Headquarters (Province, Country)

Table 24. China Based Companies Underwater Acoustic Communication Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Underwater Acoustic Communication Revenue Market Share (2021-2026)

Table 26. Rest of World Based Underwater Acoustic Communication Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Underwater Acoustic Communication Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Underwater Acoustic Communication Revenue Market Share (2021-2026)

Table 29. World Underwater Acoustic Communication Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Underwater Acoustic Communication Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Underwater Acoustic Communication Market Size by Type (2027-2032) & (USD Million)

Table 32. World Underwater Acoustic Communication Market Size by Communication Range, (USD Million), 2021 & 2025 & 2032

Table 33. World Underwater Acoustic Communication Market Size Value by Communication Range (2021-2026) & (USD Million)

Table 34. World Underwater Acoustic Communication Market Size by Communication Range (2027-2032) & (USD Million)

Table 35. World Underwater Acoustic Communication Market Size by Operating Frequency, (USD Million), 2021 & 2025 & 2032

Table 36. World Underwater Acoustic Communication Market Size Value by Operating Frequency (2021-2026) & (USD Million)

Table 37. World Underwater Acoustic Communication Market Size by Operating Frequency (2027-2032) & (USD Million)

Table 38. World Underwater Acoustic Communication Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Underwater Acoustic Communication Market Size by Application (2021-2026) & (USD Million)

Table 40. World Underwater Acoustic Communication Market Size by Application (2027-2032) & (USD Million)

Table 41. Teledyne Marine Basic Information, Manufacturing Base and Competitors

Table 42. Teledyne Marine Major Business

Table 43. Teledyne Marine Underwater Acoustic Communication Product and Services

Table 44. Teledyne Marine Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. Teledyne Marine Recent Developments/Updates

Table 46. Teledyne Marine Competitive Strengths & Weaknesses

Table 47. Sonardyne Basic Information, Manufacturing Base and Competitors

Table 48. Sonardyne Major Business

Table 49. Sonardyne Underwater Acoustic Communication Product and Services

Table 50. Sonardyne Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 51. Sonardyne Recent Developments/Updates

Table 52. Sonardyne Competitive Strengths & Weaknesses

Table 53. Thales Basic Information, Manufacturing Base and Competitors

Table 54. Thales Major Business

Table 55. Thales Underwater Acoustic Communication Product and Services

Table 56. Thales Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. Thales Recent Developments/Updates

Table 58. Thales Competitive Strengths & Weaknesses

Table 59. Kongsberg Discovery Basic Information, Manufacturing Base and Competitors

Table 60. Kongsberg Discovery Major Business

Table 61. Kongsberg Discovery Underwater Acoustic Communication Product and Services

Table 62. Kongsberg Discovery Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. Kongsberg Discovery Recent Developments/Updates

Table 64. Kongsberg Discovery Competitive Strengths & Weaknesses

Table 65. Ultra Electronics Basic Information, Manufacturing Base and Competitors

Table 66. Ultra Electronics Major Business

Table 67. Ultra Electronics Underwater Acoustic Communication Product and Services

Table 68. Ultra Electronics Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 69. Ultra Electronics Recent Developments/Updates

Table 70. Ultra Electronics Competitive Strengths & Weaknesses

Table 71. Mistral Solutions Basic Information, Manufacturing Base and Competitors
Table 72. Mistral Solutions Major Business
Table 73. Mistral Solutions Underwater Acoustic Communication Product and Services
Table 74. Mistral Solutions Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. Mistral Solutions Recent Developments/Updates
Table 76. Mistral Solutions Competitive Strengths & Weaknesses
Table 77. Aquatec Group Basic Information, Manufacturing Base and Competitors
Table 78. Aquatec Group Major Business
Table 79. Aquatec Group Underwater Acoustic Communication Product and Services
Table 80. Aquatec Group Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Aquatec Group Recent Developments/Updates
Table 82. Aquatec Group Competitive Strengths & Weaknesses
Table 83. L3Harris Basic Information, Manufacturing Base and Competitors
Table 84. L3Harris Major Business
Table 85. L3Harris Underwater Acoustic Communication Product and Services
Table 86. L3Harris Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. L3Harris Recent Developments/Updates
Table 88. L3Harris Competitive Strengths & Weaknesses
Table 89. Tritech Basic Information, Manufacturing Base and Competitors
Table 90. Tritech Major Business
Table 91. Tritech Underwater Acoustic Communication Product and Services
Table 92. Tritech Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. Tritech Recent Developments/Updates
Table 94. Tritech Competitive Strengths & Weaknesses
Table 95. Nortek Basic Information, Manufacturing Base and Competitors
Table 96. Nortek Major Business
Table 97. Nortek Underwater Acoustic Communication Product and Services
Table 98. Nortek Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 99. Nortek Recent Developments/Updates
Table 100. Nortek Competitive Strengths & Weaknesses
Table 101. EvoLogics Basic Information, Manufacturing Base and Competitors
Table 102. EvoLogics Major Business
Table 103. EvoLogics Underwater Acoustic Communication Product and Services
Table 104. EvoLogics Underwater Acoustic Communication Revenue, Gross Margin

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

Table 105. EvoLogics Recent Developments/Updates

Table 106. EvoLogics Competitive Strengths & Weaknesses

Table 107. LinkQuest Basic Information, Manufacturing Base and Competitors

Table 108. LinkQuest Major Business

Table 109. LinkQuest Underwater Acoustic Communication Product and Services

Table 110. LinkQuest Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 111. LinkQuest Recent Developments/Updates

Table 112. LinkQuest Competitive Strengths & Weaknesses

Table 113. WHOI Basic Information, Manufacturing Base and Competitors

Table 114. WHOI Major Business

Table 115. WHOI Underwater Acoustic Communication Product and Services

Table 116. WHOI Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 117. WHOI Recent Developments/Updates

Table 118. WHOI Competitive Strengths & Weaknesses

Table 119. Hydroacoustic Basic Information, Manufacturing Base and Competitors

Table 120. Hydroacoustic Major Business

Table 121. Hydroacoustic Underwater Acoustic Communication Product and Services

Table 122. Hydroacoustic Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 123. Hydroacoustic Recent Developments/Updates

Table 124. Hydroacoustic Competitive Strengths & Weaknesses

Table 125. 715 Research Institute of China State Shipbuilding Corporation (CSSC) Basic Information, Manufacturing Base and Competitors

Table 126. 715 Research Institute of China State Shipbuilding Corporation (CSSC) Major Business

Table 127. 715 Research Institute of China State Shipbuilding Corporation (CSSC) Underwater Acoustic Communication Product and Services

Table 128. 715 Research Institute of China State Shipbuilding Corporation (CSSC) Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 129. 715 Research Institute of China State Shipbuilding Corporation (CSSC) Recent Developments/Updates

Table 130. 715 Research Institute of China State Shipbuilding Corporation (CSSC) Competitive Strengths & Weaknesses

Table 131. Institute of Acoustics, Chinese Academy of Sciences (IACAS) Basic Information, Manufacturing Base and Competitors

Table 132. Institute of Acoustics, Chinese Academy of Sciences (IACAS) Major Business

Table 133. Institute of Acoustics, Chinese Academy of Sciences (IACAS) Underwater Acoustic Communication Product and Services

Table 134. Institute of Acoustics, Chinese Academy of Sciences (IACAS) Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 135. Institute of Acoustics, Chinese Academy of Sciences (IACAS) Recent Developments/Updates

Table 136. Institute of Acoustics, Chinese Academy of Sciences (IACAS) Competitive Strengths & Weaknesses

Table 137. Haidiying Deep-Sea Technology Basic Information, Manufacturing Base and Competitors

Table 138. Haidiying Deep-Sea Technology Major Business

Table 139. Haidiying Deep-Sea Technology Underwater Acoustic Communication Product and Services

Table 140. Haidiying Deep-Sea Technology Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 141. Haidiying Deep-Sea Technology Recent Developments/Updates

Table 142. Haidiying Deep-Sea Technology Competitive Strengths & Weaknesses

Table 143. Beijing Great Wall Electronic Equipment Basic Information, Manufacturing Base and Competitors

Table 144. Beijing Great Wall Electronic Equipment Major Business

Table 145. Beijing Great Wall Electronic Equipment Underwater Acoustic Communication Product and Services

Table 146. Beijing Great Wall Electronic Equipment Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 147. Beijing Great Wall Electronic Equipment Recent Developments/Updates

Table 148. Beijing Great Wall Electronic Equipment Competitive Strengths & Weaknesses

Table 149. Shenzhen Smart Ocean Technology Basic Information, Manufacturing Base and Competitors

Table 150. Shenzhen Smart Ocean Technology Major Business

Table 151. Shenzhen Smart Ocean Technology Underwater Acoustic Communication Product and Services

Table 152. Shenzhen Smart Ocean Technology Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 153. Shenzhen Smart Ocean Technology Recent Developments/Updates

Table 154. Shenzhen Smart Ocean Technology Competitive Strengths & Weaknesses

Table 155. Haiying Jiake Basic Information, Manufacturing Base and Competitors

Table 156. Haiying Jiake Major Business

Table 157. Haiying Jiake Underwater Acoustic Communication Product and Services

Table 158. Haiying Jiake Underwater Acoustic Communication Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 159. Haiying Jiake Recent Developments/Updates

Table 160. Haiying Jiake Competitive Strengths & Weaknesses

Table 161. Global Key Players of Underwater Acoustic Communication Upstream (Raw Materials)

Table 162. Global Underwater Acoustic Communication Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Underwater Acoustic Communication Picture
- Figure 2. World Underwater Acoustic Communication Total Revenue: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World Underwater Acoustic Communication Total Revenue (2021-2032) & (USD Million)
- Figure 4. World Underwater Acoustic Communication Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
- Figure 5. World Underwater Acoustic Communication Revenue Market Share by Region (2021-2032), (by Headquarter Location)
- Figure 6. United States Based Company Underwater Acoustic Communication Revenue (2021-2032) & (USD Million)
- Figure 7. China Based Company Underwater Acoustic Communication Revenue (2021-2032) & (USD Million)
- Figure 8. Europe Based Company Underwater Acoustic Communication Revenue (2021-2032) & (USD Million)
- Figure 9. Japan Based Company Underwater Acoustic Communication Revenue (2021-2032) & (USD Million)
- Figure 10. South Korea Based Company Underwater Acoustic Communication Revenue (2021-2032) & (USD Million)
- Figure 11. ASEAN Based Company Underwater Acoustic Communication Revenue (2021-2032) & (USD Million)
- Figure 12. India Based Company Underwater Acoustic Communication Revenue (2021-2032) & (USD Million)
- Figure 13. Underwater Acoustic Communication Market Drivers
- Figure 14. Factors Affecting Demand
- Figure 15. World Underwater Acoustic Communication Consumption Value (2021-2032) & (USD Million)
- Figure 16. World Underwater Acoustic Communication Consumption Value Market Share by Region (2021-2032)
- Figure 17. United States Underwater Acoustic Communication Consumption Value (2021-2032) & (USD Million)
- Figure 18. China Underwater Acoustic Communication Consumption Value (2021-2032) & (USD Million)
- Figure 19. Europe Underwater Acoustic Communication Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Underwater Acoustic Communication Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea Underwater Acoustic Communication Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Underwater Acoustic Communication Consumption Value (2021-2032) & (USD Million)

Figure 23. India Underwater Acoustic Communication Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Underwater Acoustic Communication by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Underwater Acoustic Communication Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Underwater Acoustic Communication Markets in 2025

Figure 27. United States VS China: Underwater Acoustic Communication Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Underwater Acoustic Communication Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Underwater Acoustic Communication Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Underwater Acoustic Communication Market Size Market Share by Type in 2025

Figure 31. Modem

Figure 32. Hydrophones

Figure 33. Others

Figure 34. World Underwater Acoustic Communication Market Size Market Share by Type (2021-2032)

Figure 35. World Underwater Acoustic Communication Market Size by Communication Range, (USD Million), 2021 & 2025 & 2032

Figure 36. World Underwater Acoustic Communication Market Size Market Share by Communication Range in 2025

Figure 37. ?1 km

Figure 38. 1–10 km

Figure 39. ?10 km

Figure 40. World Underwater Acoustic Communication Market Size Market Share by Communication Range (2021-2032)

Figure 41. World Underwater Acoustic Communication Market Size by Operating Frequency, (USD Million), 2021 & 2025 & 2032

Figure 42. World Underwater Acoustic Communication Market Size Market Share by

Operating Frequency in 2025

Figure 43. ≥ 10 kHz

Figure 44. 10–100 kHz

Figure 45. ≥ 100 kHz

Figure 46. World Underwater Acoustic Communication Market Size Market Share by Operating Frequency (2021-2032)

Figure 47. World Underwater Acoustic Communication Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 48. World Underwater Acoustic Communication Market Size Market Share by Application in 2025

Figure 49. Military Surveillance

Figure 50. Underwater Monitoring

Figure 51. Underwater Biological Studies

Figure 52. Others

Figure 53. World Underwater Acoustic Communication Market Size Market Share by Application (2021-2032)

Figure 54. Underwater Acoustic Communication Industrial Chain

Figure 55. Methodology

Figure 56. Research Process and Data Source

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