

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

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Abstracts

The global Underwater Acoustic Modem market size is expected to reach \$ 6012 million by 2032, rising at a market growth of 9.5% CAGR during the forecast period (2026-2032).

In 2025, global sales of Underwater Acoustic Modem reached 76,100 units, with an average price of approximately US\$41,000 per unit. Underwater Acoustic Modem utilize sound waves, rather than electromagnetic waves, for wireless communication transmission underwater. Because electromagnetic waves attenuate extremely quickly in seawater, sound waves have become the mainstream means of transmitting text, voice, and image data over medium to long distances (several kilometers to thousands of kilometers) underwater, earning them the nickname 'underwater telephone.' The core component is the transducer. The working principle of an underwater acoustic communication device is as follows: first, text, voice, and image information are converted into electrical signals. After the encoder digitizes the information, the transducer converts the electrical signals back into sound signals. These sound signals are transmitted through the water medium to the receiving transducer, where they are converted back into electrical signals. The decoder then deciphers the digital information, and the receiver converts the information into sound, text, and images.

While underwater communication has traditionally relied on acoustics, in recent years, various other methods, including visible light, radio frequency, electromagnetic waves, and magnetic induction, have emerged. Acoustic communication boasts the longest coverage (several kilometers) and relatively mature equipment, but suffers from low bandwidth and high latency. Underwater optical communication (UWOC) utilizes blue-green light/lasers to achieve speeds from tens of Mbps to Gbps, suitable for short-range, high-throughput scenarios. Radio frequency/electromagnetic wave

communication penetrates shallow waters but has extremely low speeds, only suitable for ultra-low frequency deep-sea submarine communication. Magnetic induction communication (UMIC) has become a research hotspot in recent years, possessing advantages such as weak multipath propagation and cross-medium stability.

Acoustic communication is used for remote control, underwater internet (UANs), etc.; optical communication is used for short-range high-definition acquisition and real-time video (deep-sea exploration, seabed observation networks); radio frequency communication is used for submarine command (ELF/VLF); magnetic induction communication is applied to short-range safety communication (divers, shipwreck exploration). These different modes complement each other, enabling the construction of multi-medium communication links and improving robustness.

The recent expansion of the global marine economy has led to a surge in 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 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 submarine observation networks and oil and gas operation networking projects, promoting large-scale applications.

This report studies the global Underwater Acoustic Modem production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Underwater Acoustic Modem total production and demand, 2021-2032, (Units)

Global Underwater Acoustic Modem total production value, 2021-2032, (USD Million)

Global Underwater Acoustic Modem production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Underwater Acoustic Modem consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Underwater Acoustic Modem domestic production, consumption, key domestic manufacturers and share

Global Underwater Acoustic Modem production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Underwater Acoustic Modem production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Underwater Acoustic Modem production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Underwater Acoustic Modem market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include EvoLogics, Kongsberg, L3Harris, Sonardyne, DSPComm, Teledyne Benthos, The 715th Research Institute of China State Shipbuilding Corporation Limited, Shenzhen Zhilan Technology, The Institute of Acoustics of the Chinese Academy of Sciences, Northwestern Polytechnical University, 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 Modem 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 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 Modem Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Underwater Acoustic Modem Market, Segmentation by Type:

Short Distance (0-3km)

Medium Distance (3-6km)

Long Distance (6km and above)

Global Underwater Acoustic Modem Market, Segmentation by Deployment Method:

Underwater Engineering Equipment

Underwater Robots

Seabed Observation Network

Others

Global Underwater Acoustic Modem Market, Segmentation by Product Structure:

Split Type

All-in-one

Global Underwater Acoustic Modem Market, Segmentation by Application:

Offshore Oil and Gas

Offshore Mineral Resource Exploration

Offshore Wind Power

Marine Communications

Marine Ranching

Scientific Research and Environmental Monitoring

Military Use

Consumer Use

Other

Companies Profiled:

EvoLogics

Kongsberg

L3Harris

Sonardyne

DSPComm

Teledyne Benthos

The 715th Research Institute of China State Shipbuilding Corporation Limited

Shenzhen Zhilan Technology

The Institute of Acoustics of the Chinese Academy of Sciences

Northwestern Polytechnical University

Shenzhen Smart Ocean Technology

Whale Wave Technology

Key Questions Answered:

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

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