

Global Underwater Acoustic Positioning and Communicating System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Underwater Acoustic Positioning and Communicating System market size is expected to reach \$ 8249 million by 2032, rising at a market growth of 8.4% CAGR during the forecast period (2026-2032).

In 2025, the global production of underwater acoustic positioning and communication systems reached 100,000 units, with an average price of approximately US\$46,000 per unit. Underwater acoustic positioning systems are specialized technologies for tracking and locating underwater targets, widely used in marine scientific research, seabed topography mapping, ROV/AUV operation, and underwater construction. These systems typically employ acoustic positioning methods such as ultra-short baseline (USBL), short baseline (SBL), or long baseline (LBL), calculating the target's relative position in the water through sound wave transmission between an underwater transponder and a receiver on board. Such systems can integrate depth, tilt, and GPS sensor information to improve positioning accuracy and real-time response capabilities, making them indispensable tools for high-precision underwater operations. Underwater acoustic communication systems utilize sound waves, rather than electromagnetic waves, for underwater information transmission. 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 system is to first convert text, voice, and image information into electrical signals, then digitize the information using an encoder, and finally, the transducer converts the electrical signals back into sound signals. Sound signals are transmitted to the receiving transducer through the medium of water. The

sound signals are then converted into electrical signals. After the decoder deciphers the digital information, the electrical receiver converts the information into sound, text, and images.

Traditional underwater communication and positioning systems are mostly independent, designed separately for data transmission and navigation needs. In recent years, a research approach of communication and positioning integration has emerged, where underwater acoustic communication and navigation share signals, hardware, and processing resources to form an integrated network. For example, research has proposed using time-division multiplexing to support both active and passive positioning, or using a single transducer to simultaneously transmit and receive communication and positioning signals. Integrated systems are suitable for AUV/ROV swarm operations (formation communication and mutual positioning), seabed observation networks, and submarine vehicles, reducing equipment redundancy and improving efficiency. For instance, underwater positioning buoys can also act as communication relays, providing real-time data transmission and precise positioning services to autonomous underwater vehicles.

Currently, some naval research institutions and manufacturers have conducted trials, such as the integrated fiber optic structure design proposed by the China Shipbuilding Research Institute. Foreign companies (such as Evologics and Sonardyne) are also developing acoustic communication modules with positioning capabilities. Although complete commercial products are not yet widespread, government projects and military programs are driving prototype system verification.

Due to the technical requirement to balance communication bandwidth and positioning accuracy, the complex acoustic characteristics introduce Doppler and multipath interference, making system design highly challenging. Integrated solutions may face issues such as bandwidth allocation, intermodulation interference, and increased power consumption. Furthermore, international standards and protocols are not yet unified, and equipment interoperability remains to be addressed.

Underwater communication has traditionally relied on acoustics, but in recent years, various methods such as 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 rates 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 rates, suitable only for ultra-low frequency deep-sea submarine communication. Magnetic induction communication (UMIC) has become a research hotspot in recent years, offering advantages such as weak multipath and cross-medium stability.

Acoustic communication is used for remote control and underwater internet (UANs); 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); and magnetic induction communication is used for short-range safety communication (divers, shipwreck exploration). Different modes complement each other, enabling the construction of multi-media communication links and improving robustness.

Internationally, Sonardyne's BlueComm series and Hydromea's LUMA-X from Switzerland have achieved commercially viable UWOC products (Mbps-level rates within 15-150 meters). In the field of electromagnetic communication, submarine manufacturers (US and Russia) use ELF/VLF antennas for deep-sea command. Domestically, the Xi'an Institute of Optics and Precision Mechanics of the Chinese Academy of Sciences and Wuhan Liubo are promoting the commercialization of blue-green optical communication products. Magnetic induction communication equipment is mainly developed in universities and military laboratories and has not yet reached mass production.

Underwater environments are highly variable; optical communication is affected by turbidity and requires high directionality; magnetic induction has a short propagation distance (only tens of meters) and limited bandwidth. Integrating multiple communication methods increases system complexity and cost. Uncertainties related to the environment and regulations (such as marine flora and fauna protection) may also constrain the use of new frequency bands. Furthermore, long-term stability and reliability require extensive sea trials for verification.

Currently, commonly used underwater positioning methods include acoustic navigation and inertial navigation. Acoustic positioning (such as LBL/USBL) relies on underwater acoustic beacon ranging and can provide meter-level accuracy; inertial navigation (INS) can estimate the track in real time, but drift increases over time. Multi-sensor-assisted positioning technologies, such as geomagnetic, image, and topological methods, are also under research. Research literature indicates that using DVL (Doppler velocimeter) to assist INS or introducing rasterized Bayesian estimation can improve accuracy.

In acoustic positioning, digital spread spectrum and broadband signal time difference estimation techniques improve ranging accuracy; real-time sound velocity profile compensation technology can correct sound ray bending errors. Meanwhile, Ultra-short baseline (USBL) systems combining inertial and satellite positioning (buoys or surface vessels with GPS) can reduce surface drift errors. Advances in micro-inertial navigation chip technology have also led to low-cost, high-precision INS (such as FOG and MEMS).

Acoustic positioning systems are commercially mature, with companies like Sonardyne, Kongsberg, and IXBLUE providing LBL/USBL equipment. Domestic marine equipment companies and research institutes have also launched underwater acoustic positioning instruments. Inertial navigation and acoustic fusion navigation systems (such as INS+DVL+USBL) are gradually becoming commercialized. Integrated navigation systems from companies like Teledyne Gavia and SAAB Sweden are already available on the market. Long-term positioning algorithms (such as particle filtering and tightly coupled GNSS/INS) are being adopted by military and civilian aviation and unmanned systems. The sound velocity profile in the deep-sea environment is complex and variable, requiring precise calibration to prevent error accumulation. Underwater sensors are susceptible to contamination and have a high failure rate. Expensive inertial and acoustic equipment drives up costs, limiting widespread adoption. The application of artificial intelligence technology in decision-making and navigation during autonomous navigation missions still requires extensive validation.

Underwater platforms are becoming increasingly intelligent, making the formation of underwater wireless sensor networks (UWSNs) a trend. Combining AUV swarms, UUVs, fixed sensor nodes, and the Internet of Things (IoT) concept to build an 'Underwater Internet of Things' (IoUT). Machine learning (ML) algorithms are being applied to channel estimation and adaptive scheduling. Research on multi-agent collaboration and formation control is active.

AI technology is revolutionizing signal processing and network management. For example, deep learning can be used for equalization and identification of complex underwater acoustic channels, improving communication reliability; reinforcement learning is used to optimize resource allocation and routing decisions. Self-organizing networking technology for multi-AUV formations enables dynamic topology communication, and some research has already achieved multi-node mesh network experiments. Other innovative areas such as biomimetic sonar (mimicking dolphin echolocation) and underwater acoustic reference station clusters are also being explored.

The military and research institutions are taking the lead in deployment, such as the US Navy and DARPA investing in the Multi-Automatic Underwater System (MANTA) program. Domestic smart ocean companies are exploring AUV IoT applications. Commercially, seabed sensor networks and autonomous vessels (such as seabed mining vehicles) are beginning to adopt integrated communication and positioning modules. Intelligent algorithm platforms (some open-source, such as the UWsim simulation environment) and commercial AI chips are also providing technical support to the industry.

Underwater network bandwidth limitations and high latency are major bottlenecks, making it difficult to transmit high-definition images or videos in real time. AI algorithms have high computational resource requirements, but underwater nodes have limited power consumption. Privacy and security are also concerns, such as the vulnerability of networks to interference or attacks. The robustness and collision avoidance capabilities of multi-AUV formations still need improvement.

In recent years, the global marine economy has expanded, leading to a surge in demand for underwater acoustic systems. The industry has developed a relatively complete product chain, including commercial underwater acoustic modems (Evolistics, LinkQuest, etc.), high-precision sonar positioning systems (Sonardyne, L3), autonomous underwater vehicles (ASVs, ROVs), and platform integration solutions. China's 'Jiaolong' and 'Fendouzhe' manned submersible projects have facilitated 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 are also experiencing growing demand for long-endurance, broadband communication. The civilian market, including environmental monitoring and marine scientific research, shows significant potential. Consumer applications, such as recreational underwater communication, are still in their early stages.

Several 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 observation networks and networked oil and gas operations have adopted underwater

acoustic technology, driving large-scale applications.

Currently, the manufacturing cost and complexity of underwater acoustic equipment remain high, and some key components in the industrial 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; at the same time, the harsh marine environment leads to high costs for equipment maintenance and upgrades. Regarding policy risks, environmental regulations (noise pollution) and maritime sovereignty restrictions on cross-border communication deployment need to be considered.

This report studies the global Underwater Acoustic Positioning and Communicating System production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Underwater Acoustic Positioning and Communicating System total production and demand, 2021-2032, (Units)

Global Underwater Acoustic Positioning and Communicating System total production value, 2021-2032, (USD Million)

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

Global Underwater Acoustic Positioning and Communicating System consumption by region & country, CAGR, 2021-2032 & (Units)

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

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

Global Underwater Acoustic Positioning and Communicating System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Underwater Acoustic Positioning and Communicating System production by

Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Underwater Acoustic Positioning and Communicating 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 EvoLogics, Kongsberg, LinkQuest, Sonardyne, Exail, Teledyne Benthos, Blueprint Design, The 715th Research Institute of China State Shipbuilding Corporation Limited, Harbin Engineering University, The Institute of Acoustics of the Chinese Academy of Sciences, 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 Positioning and Communicating 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 Underwater Acoustic Positioning and Communicating System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Underwater Acoustic Positioning and Communicating System Market,
Segmentation by Type:

Underwater Acoustic Positioning System

Underwater Acoustic Communication System

Global Underwater Acoustic Positioning and Communicating System Market,
Segmentation by Deployment Method:

Underwater Engineering Equipment

Underwater Robots

Seabed Observation Network

Others

Global Underwater Acoustic Positioning and Communicating System Market,
Segmentation by Product:

Underwater Acoustic Communication Device

Underwater Acoustic Positioning Beacon

Underwater Acoustic Positioning Base Station

Global Underwater Acoustic Positioning and Communicating System Market,
Segmentation by Application:

Offshore Oil and Gas

Offshore Wind Power

Marine Minerals

Marine Communications

Scientific Research and Environmental Monitoring

Marine Fisheries

Military

Consumer Market

Others

Companies Profiled:

EvoLogics

Kongsberg

LinkQuest

Sonardyne

Exail

Teledyne Benthos

Blueprint Design

The 715th Research Institute of China State Shipbuilding Corporation Limited

Harbin Engineering University

The Institute of Acoustics of the Chinese Academy of Sciences

Northwestern Polytechnical University

Jiaxing Acoustics Technology

Shenzhen Smart Ocean Technology

Whale Wave Technology

Shenzhen Zhilan Technology

Key Questions Answered:

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

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