

Global Underwater & Fluid Environment 3D Measurement System Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G00219B1CA99EN.html>

Date: June 2026

Pages: 211

Price: US\$ 4,480.00 (Single User License)

ID: G00219B1CA99EN

Abstracts

The global Underwater & Fluid Environment 3D Measurement System market size is expected to reach \$ 8358 million by 2032, rising at a market growth of 8.5% CAGR during the forecast period (2026-2032).

Underwater and fluid environment 3D measurement systems refer to integrated hardware and software measurement solutions used in marine, freshwater, and industrial fluid media to acquire three-dimensional topography, geometric dimensions, spatial position, and dynamic variation data of underwater targets, seabed/riverbed terrain, fluid field spatial structures, and submerged infrastructure. These systems employ acoustic (multibeam, side-scan sonar, interferometric sonar) or optical (underwater laser, underwater structured light) sensing principles, delivering underwater 3D data acquisition hardware, embedded signal processing units, attitude and positioning compensation modules, and companion 3D visualization and post-processing software as an integrated solution. Application scenarios include offshore engineering and vessel underwater structure inspection, submarine pipeline and cable surveying, underwater archaeology and shipwreck documentation, dam and culvert safety monitoring, and 3D velocity field and free surface measurement in fluid dynamics experiments.

This market comprises several specialized segments: multi-beam echo sounder systems constitute the largest single product category, widely utilized in seabed mapping and route surveys; 3D sonar (including 3D real-time imaging sonar, 3D scanning sonar, and 3D side-scan sonar) represents the fastest-growing sub-category; underwater 3D laser scanning hardware—specifically underwater laser equipment mounted on ROVs—is projected to reach approximately \$1.63 billion by 2025 (a figure

that includes a significant volume of single-point ranging devices, with 3D scanning accounting for a smaller share); Acoustic Doppler Current Profilers (ADCP); and Particle Image Velocimetry (PIV) systems. Pricing exhibits clear stratification by accuracy grade: Survey-Grade systems (multibeam echosounders, side scan sonar) typically range from USD 100,000 to USD 600,000 per unit, with flagship models reaching million-dollar levels, and global 3D scanning sonar averaging approximately USD 250,000 per unit; Inspection-Grade systems (3D imaging sonar, underwater laser scanners, underwater structured light systems) range from USD 80,000 to USD 400,000, with underwater 3D laser scanners averaging USD 120,000 to USD 250,000; Metrology-Grade systems (subsea LiDAR metrology systems, deep-sea laser scanners) command the highest prices, typically ranging from USD 300,000 to over USD 1.2 million, serving high-precision applications such as subsea connector alignment and flange flatness verification; Research-Grade fluid measurement systems (3D PIV, ADCP) range from USD 50,000 to USD 300,000, with high-end 3D PIV systems exceeding USD 500,000. Gross margins for hardware-focused companies generally fall between 48% and 60%, with Kongsberg Maritime's overall margin at approximately 48%–52%, Teledyne Marine's digital imaging segment operating at approximately 55%–58%, and the high value-added nature of acoustic transducers and signal processing modules sustaining industry profitability; fluid measurement specialists such as LaVision and Dantec Dynamics report margins of approximately 55%–65%. Downstream applications are concentrated: Offshore Energy & Subsea Infrastructure constitutes the largest application segment, accounting for approximately 40% of total industry demand, covering offshore platform jacket inspection, subsea pipeline and cable route surveys, offshore wind turbine foundation scour monitoring, and subsea manifold metrology, with the subsea IMR services market valued at approximately USD 6.7 billion in 2025 and subsea metrology services at approximately USD 1.3 billion, providing a sustained demand baseline for 3D measurement hardware. Marine Civil Engineering & Hydropower represents the second-largest application segment, including dam face inspection, intake and outlet structure assessment, and tunnel/caisson dimensional verification. Port, Harbor & Inland Waterway, Underwater Archaeology & Cultural Heritage, Vessel & Naval Engineering, and Fluid Dynamics Research constitute important incremental markets. In underwater archaeology, the global underwater archaeological survey systems market was valued at approximately USD 271 million in 2024 and is projected to reach USD 535 million by 2030, with a CAGR of approximately 12%. In fluid measurement, the global particle image velocimetry instrument market was valued at approximately USD 280 million in 2024 and is forecast to reach USD 389 million by 2031. Upstream critical components include acoustic transducer arrays, piezoelectric ceramic materials, high-precision attitude sensors, sound velocity profilers, pressure-tolerant optical windows, and embedded

signal processing units, with high-end acoustic component supply concentrated among Norwegian, American, British, and French manufacturers, while Chinese players have achieved partial import substitution in piezoelectric ceramics and mid-range transducers. The competitive landscape is characterized by entrenched incumbents and ascendant challengers: Western players including Kongsberg Maritime, Teledyne Marine, Exail (formerly iXblue), Sonardyne, and R2Sonic dominate multibeam echosounding, 3D imaging sonar, and subsea metrology categories, while Kraken Robotics (including 3D at Depth) maintains technical leadership in subsea LiDAR metrology, having completed its 1,000th subsea metrology project. Chinese manufacturers including Hydro-Tech, Hi-Target, Huace Navigation, and South Survey are accelerating catch-up in multibeam echosounding and acoustic positioning; Deepinfar, YuanShi Tech, and LanKe Optoelectronics are progressively making breakthroughs in underwater optical 3D measurement; Jiandong Tech and QianYanLang have achieved partial import substitution in fluid 3D PIV systems. Uncertainties concentrate on three fronts: first, the manufacturing processes for high-end acoustic transducer arrays and deep-sea pressure-tolerant optical windows remain controlled by a limited number of Western suppliers, constituting persistent technical barriers; second, cyclical fluctuations in offshore oil and gas capital expenditure affect procurement cadence for inspection-grade equipment, though rapid offshore wind expansion provides a counterbalancing force; third, the lack of uniform standards for acoustic data formats and point cloud processing protocols across different vendors constrains large-scale multi-source collaborative surveying projects. Conclusion: The underwater and fluid environment 3D measurement systems industry is in the mid-growth stage, fundamentally driven by accelerating global offshore wind deployment generating non-discretionary demand for foundation inspection, aging offshore oil and gas assets driving in-service monitoring requirements, and strategic government investment in maritime territorial mapping and underwater cultural heritage preservation. The structural hallmark of the current landscape is a tiered competitive dynamic wherein Western players retain dominance in acoustic 3D measurement and deep-sea metrology, while Chinese players accelerate substitution in multibeam echosounding and mid-range sonar and progressively extend into optical 3D measurement applications.

This report studies the global Underwater & Fluid Environment 3D Measurement System demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Underwater & Fluid Environment 3D Measurement 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 & Fluid Environment 3D Measurement System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Underwater & Fluid Environment 3D Measurement System total market, 2021-2032, (USD Million)

Global Underwater & Fluid Environment 3D Measurement System total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Underwater & Fluid Environment 3D Measurement System total market, key domestic companies, and share, (USD Million)

Global Underwater & Fluid Environment 3D Measurement System revenue by player, revenue and market share 2021-2026, (USD Million)

Global Underwater & Fluid Environment 3D Measurement System total market by Type, CAGR, 2021-2032, (USD Million)

Global Underwater & Fluid Environment 3D Measurement System total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Underwater & Fluid Environment 3D Measurement System 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 Kongsberg Maritime, Teledyne Marine, Exail, Sonardyne, R2Sonic, EdgeTech, NORBIT Subsea, Voyis, 3D at Depth, Kraken Robotics, 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 & Fluid Environment 3D Measurement System 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 & Fluid Environment 3D Measurement System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Underwater & Fluid Environment 3D Measurement System Market, Segmentation by Type:

Acoustic 3D Measurement

Optical 3D Measurement

Fluid Flow 3D Measurement

Global Underwater & Fluid Environment 3D Measurement System Market, Segmentation by Accuracy:

Survey-Grade (± 5 – 30 cm)

Inspection-Grade (± 0.5 – 5 mm)

Metrology-Grade (± 0.02 – 0.5 mm)

Research-Grade (Velocity Uncertainty 0.5%–2%)

Global Underwater & Fluid Environment 3D Measurement System Market, Segmentation by Application:

Offshore Energy & Subsea Infrastructure

Marine Civil Engineering & Hydropower

Port, Harbor & Inland Waterway

Underwater Archaeology & Cultural Heritage

Vessel & Naval Engineering

Fluid Dynamics Research & Testing

Others

Companies Profiled:

Kongsberg Maritime

Teledyne Marine

Exail

Sonardyne

R2Sonic

EdgeTech

NORBIT Subsea

Voyis

3D at Depth

Kraken Robotics

Newton Labs

Savante Subsea

2G Robotics

Tritech International

Nortek

SonTek / Xylem

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Unique Group

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Blueprint Design Engineering

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Hydro-Tech

Hi-Target

Huace Navigation

South Survey

Deepinfar

AOHI

YuanShi Tech

LanKe Optoelectronics

Wuxi Zhihai

Haipai Marine

Haiyan Electronics

Key Questions Answered

1. How big is the global Underwater & Fluid Environment 3D Measurement System market?
2. What is the demand of the global Underwater & Fluid Environment 3D Measurement System market?
3. What is the year over year growth of the global Underwater & Fluid Environment 3D Measurement System market?
4. What is the total value of the global Underwater & Fluid Environment 3D Measurement System market?
5. Who are the Major Players in the global Underwater & Fluid Environment 3D Measurement System market?
6. What are the growth factors driving the market demand?

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