

# Global Underwater & Fluid Environment 3D Measurement System Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Underwater & Fluid Environment 3D Measurement System market size was valued at US\$ 4713 million in 2025 and is forecast to a readjusted size of US\$ 8358 million by 2032 with a CAGR of 8.5% during review period.

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 is a detailed and comprehensive analysis for global Underwater & Fluid Environment 3D Measurement System market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across

many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

#### Key Features:

Global Underwater & Fluid Environment 3D Measurement System market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Underwater & Fluid Environment 3D Measurement System market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Underwater & Fluid Environment 3D Measurement System market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Underwater & Fluid Environment 3D Measurement System market shares of main players, in revenue (\$ Million), 2021-2026

#### The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Underwater & Fluid Environment 3D Measurement System

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key 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.

## Market segmentation

Underwater & Fluid Environment 3D Measurement System market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

### Market segment by Type

Acoustic 3D Measurement

Optical 3D Measurement

Fluid Flow 3D Measurement

### Market segment by Accuracy

Survey-Grade ( $\pm 5$ –30 cm)

Inspection-Grade ( $\pm 0.5$ –5 mm)

Metrology-Grade ( $\pm 0.02$ –0.5 mm)

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

### Market segment 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

Market segment by players, this report covers

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

Imagenex Technology

Unique Group

MacArtney

Blueprint Design Engineering

Seafloor Systems

LinkQuest

Ashtead Technology

IVM Technologies

LaVision

Dantec Dynamics

Hydro-Tech

Hi-Target

Huace Navigation

South Survey

Deepinfar

AOHI

YuanShi Tech

LanKe Optoelectronics

Wuxi Zhihai

Haipai Marine

Haiyan Electronics

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Underwater & Fluid Environment 3D Measurement System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Underwater & Fluid Environment 3D Measurement System, with revenue, gross margin, and global market share of Underwater & Fluid Environment 3D Measurement System from 2021 to 2026.

Chapter 3, the Underwater & Fluid Environment 3D Measurement System competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Underwater & Fluid Environment 3D Measurement System market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Underwater & Fluid Environment 3D Measurement System.

Chapter 13, to describe Underwater & Fluid Environment 3D Measurement System research findings and conclusion.

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