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Global Submarine, Submersible, AUV, ROV, etc Sonar Market Growth 2026-2032

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Abstracts

The global Submarine, Submersible, AUV, ROV, etc Sonar market size is predicted to grow from US$ 2154 million in 2025 to US$ 3197 million in 2032; it is expected to grow at a CAGR of 5.9% from 2026 to 2032.

The sonar market for submarines, submersibles, AUVs and ROVs is entering a phase of steady expansion combined with clear structural upgrades. Industry revenues increased from about USD 1.5 billion in 2020 to around USD 2.0 billion in 2024, with 2025 expected at roughly USD 2.2 billion on sales of about 1,833 units. Over 2025–2031, total revenue is projected to grow at a compound rate of around 5.7% and unit volume at about 5.1%. By configuration, active sonar systems account for roughly 35% of revenues in 2025 but are on track to approach 40% by 2031, with an estimated revenue CAGR close to 8%, significantly outpacing passive and combined systems. In application terms, military programmes still represent about 71% of 2025 revenues, yet civilian segments—offshore wind, oil and gas, subsea infrastructure inspection and ocean science—are expected to grow faster, with a revenue CAGR of roughly 7% versus just above 5% on the military side.

The competitive landscape is shaped by large defence primes on one side and highly specialised underwater-acoustics players on the other. Lockheed Martin, Thales, L3Harris Technologies, General Dynamics and Northrop Grumman together generate around USD 1.0 billion of sonar-related revenues in 2025, representing about 46% of the market. Lockheed Martin remains a key integrator with the AN/SQQ-89 family of undersea warfare combat systems, which fuses hull-mounted, towed-array and sonobuoy sensors into a single ASW picture for AEGIS-equipped surface combatants. Thales combines submarine sonar suites, the CAPTAS variable-depth towed sonar family and mine countermeasure systems, and is widely recognised as a leading global

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exporter of naval sonar solutions, with dozens of CAPTAS systems contracted by major navies.

Below the primes, a dynamic group of specialist companies is capturing growth in high-resolution imaging and seabed mapping. Kongsberg builds on its HUGIN AUV family and HISAS synthetic aperture sonar to deliver wide-area, high-resolution seabed coverage for defence and commercial customers. Kraken Robotics focuses on synthetic aperture sonar payloads and services, offering centimetre-class resolution and high area coverage for offshore energy, mine countermeasures and seabed warfare experiments. NORBIT, Teledyne Technologies, General Oceans, Coda Octopus and others provide compact multibeam and imaging sonars optimised for small AUV/ROV and survey platforms, emphasising low power consumption and broadband performance for harbour security, pipeline inspection and research missions. On the programmes side, the U.S. Navy’s 2024 contract modification of about USD 180 million to Lockheed Martin for continued AN/SQQ-89A(V)15 engineering and system deliveries illustrates how navies are using multi-year awards to sustain undersea warfare capabilities while funding open-architecture upgrades.

Looking forward, three structural themes are likely to define the sonar landscape for submarines, submersibles, AUVs and ROVs. First, active and multistatic concepts—variable-depth towed arrays, synthetic aperture sonar and multi-frequency combinations—will continue to gain share in high-end naval programmes, driven by the need to operate in complex littoral environments and contested seabeds. Second, the rapid proliferation of uncrewed underwater and surface vehicles will sustain double-digit unit growth for compact, low-power, high-bandwidth sonar payloads that can be flexibly deployed for mine countermeasures, seabed warfare and offshore asset inspection. Third, signal processing, automatic classification and mission management are becoming increasingly software-defined, with algorithms migrating onto open architectures and commercial compute platforms. Vendors that combine acoustic hardware expertise with strong software and integration capabilities, and that straddle both military and civilian use cases, will be best placed to capture the structural growth in this evolving sonar ecosystem.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Submarine, Submersible, AUV, ROV, etc Sonar Industry Forecast” looks at past sales and reviews total world Submarine, Submersible, AUV, ROV, etc Sonar sales in 2025, providing a comprehensive analysis by region and market sector of projected Submarine,

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Submersible, AUV, ROV, etc Sonar sales for 2026 through 2032. With Submarine, Submersible, AUV, ROV, etc Sonar sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Submarine, Submersible, AUV, ROV, etc Sonar industry.

This Insight Report provides a comprehensive analysis of the global Submarine, Submersible, AUV, ROV, etc Sonar landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Submarine, Submersible, AUV, ROV, etc Sonar portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Submarine, Submersible, AUV, ROV, etc Sonar market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Submarine, Submersible, AUV, ROV, etc Sonar and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Submarine, Submersible, AUV, ROV, etc Sonar.

This report presents a comprehensive overview, market shares, and growth opportunities of Submarine, Submersible, AUV, ROV, etc Sonar market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Active Type

Passive Type

Combined Type

Segmentation by Sonar:

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Submarine Sonar

Submersible Sonar

AUV Sonar

ROV Sonar

Others

Segmentation by Displacement:

Displacement, below 2000 Tons

Displacement, 2000-5000 Tons

Displacement, above 5000 Tons

Segmentation by Application:

Military

Civilian

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

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- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa
  - Egypt
  - South Africa
  - Israel
  - Turkey
  - GCC Countries

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The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Lockheed Martin

Thales

L3Harris Technologies

General Dynamics

Northrop Grumman

Leonardo

Kongsberg

Ultra Maritime

ThyssenKrupp

Cohort

China Marine Information Electronics

DSIT Solutions (Rafael)

SAES

NORBIT

Kraken Robotics

Teledyne Technologies

General Oceans

EdgeTech

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Coda Octopus

Blueprint Subsea (AION Group)

Water Linked

Key Questions Addressed in this Report

What is the 10-year outlook for the global Submarine, Submersible, AUV, ROV, etc Sonar market?

What factors are driving Submarine, Submersible, AUV, ROV, etc Sonar market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Submarine, Submersible, AUV, ROV, etc Sonar market opportunities vary by end market size?

How does Submarine, Submersible, AUV, ROV, etc Sonar break out by Type, by Application?

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