

Sonar Systems Market by Application, Platform (Commercial vessels, Defence vessels, Unmanned Underwater Vehicles, Aircrafts, and Ports), Type, Material, and Region (North America, Europe, APAC, Middle East, & RoW) - Forecast to 2026

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Abstracts

The sonar system market is estimated to be USD 5.9 billion in 2021 and is projected to reach USD 6.5 billion by 2026, at a CAGR of 1.8% from 2021 to 2026. The market is driven by various factors, such as improved interoperability of maritime systems, increasing use of sonar systems in commercial and military vessels, increasing defense expenditure of emerging economies, and increase in demand for sonar systems in anti-submarine warfare.

Anti-submarine warfare requires special type of sonar systems with advanced capabilities. These sonar are generally operated using aircrafts. Anti-submarine warfare sonar are categorized as dipping sonar and sonobuoys.

Development of Dipping Sonars & Sonobuoys for anti-submarine warfare

Anti-submarine warfare is one of the recent trends of the marine security systems. Submarines are one such vessels which can pass through any ordinary security systems undetected because of their capability to operate below the surface of sea and the use of passive sonar which does not generate any frequencies at all. Hence, the anti-submarine warfare (ASW) becomes crucial. Sonobuoys and dipping sonars are used to detect such submarines. Dipping sonars are used on airborne platform, generally a helicopter to which it is attached. On the other hand Sonobuoys are the deployable sonars which can be deployed using fixed wing aircrafts or ships and then, they connect wirelessly to the centralized system to provide the location of submarines.

Because of their new and advanced features, these sonobuoys and dipping sonars are ordered by the militaries of many prominent countries. One of the example is the order of 20000 AN/SSQ multi-static sonobuoys placed by US military in April 2021 to ERAPSCO.

The sonar systems market includes major players Lockheed Martin (US), Raytheon Technologies (US), Thales Group (France), Kongsberg Maritime (Norway), L3Harris (US), Aselsan AS (Turkey), and Northrop Grumman Corporation (US). These players have spread their business across various countries includes North America, Europe, Asia Pacific, Middle East, and Rest of the World. COVID-19 has impacted their businesses as well. Industry experts believe that COVID-19 has affected sonar system production and services globally in 2020.

“Commercial Vessels: The largest segment of the Sonar systems market, by Platform.”

Commercial vessels platform includes all the non-military marine vessels that are used for applications like cargo transport, research, fishing, oil transport, passenger transport, etc. The commercial vessels classified as Bulk carriers, Tankers, Passenger cruise and Dry cargo. Dry cargo is further classified as Container, General cargo and Dredgers.

“Anti-submarine Warfare: The fastest-growing segment of the sonar systems market, by Application. “

Anti-submarine warfare (ASW) is a branch of underwater warfare that uses surface warships, aircraft, submarines, or other platforms, to find, track, and deter, damage, and/or destroy enemy submarines. As each new generation of submarine becomes quieter and harder to detect, the sensing technology used in ASW has in turn improved. sophisticated sonar equipment is used for first detecting, then classifying, locating, and tracking a target submarine. Sensors are therefore a key element of ASW. Common weapons for attacking submarines include torpedoes and naval mines, which can both be launched from an array of air, surface, and underwater platforms. ASW capabilities are often considered of significant strategic importance, particularly following provocative instances of unrestricted submarine warfare and the introduction of submarine-launched ballistic missiles, which greatly increased the perceived lethality of submarines. Big players like Thales and Ultra Electronics are heavily invested into AWS as it has proved its worth time and time again.

“Fixed Sonar: The fastest-growing segment of the sonar systems market, by Installation. “

“Towed Array SONAR(TAS)” is fit with hydrophones and is tugged to considerable distance i.e., 1000 meters to substantially increase signal to noise ratio. TAS is capable to detect low noise emitting submarines and seismic signals. Unlike active SONAR, TAS is passive one thus will not give out the identity, location or make of the vessel. It can further assist in identification of the enemy vessel type due to distinctive and acoustic nature of its enemy’s internal machinery.

“Hull-Mounted SONAR(HMS)” segment is set to be fastest growing in overall global SONAR market. Its integration with Expendable Bathythermograph (XBT), Underwater Telephone (UWT) AND CMS increase HMS optimization. Hull Mounted SONAR is the main underwater sensor for vessels, which can detect submarines, unmanned water vehicles, diver delivery machines and mines with accurate location. HMS using echo data with ship’s data, the system detects, measure and tracks enemy objects and presence automatically.

“YAKAMOS Hull Mounted SONAR” system is such SONAR is a medium frequency, surface ship ASW and obstacle avoidance SONAR category. 360 degrees surveillance, automatic target detection, built in test capabilities are few key features of YAKAMOS HMS system built by MeteksanSavunma, Turkey.

“Hull-mounted: The fastest-growing segment of the sonar systems market, by Product.”

Hull-mounted sonar is one of the most commonly used type of sonar. Hull-mounted sonar are attached at the bottom of the vessel. Hull-mounted sonar are used for performing various tasks like seabed monitoring, fish finding, anti-submarine warfare, diver detection etc. Hull-mounted sonar are further classified as Forward-looking sonar, Omnidirectional sonar and Echosounders.

“North America: The largest contributing region in the sonar systems market.”

North America accounts for a major share of the sonar system market at higher than XX% of the overall market and is projected to grow at CAGR of XX% during the forecast period. The major countries in the market in the North American Region are the US, Canada.

In the region, the US leads the market in this region. Substantial investments by the US & Canada in defense are among the major factors driving the market in North America.

There are various well-established and prominent sonar systems manufacturers in this region, including Northrop Grumman Corporation (US), L3Harris (US), Lockheed Martin (US), Raytheon Technologies (US), General Dynamics (US), Coda Octopus (US), and Teledyne Technologies (US).

Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1–35%; Tier 2–45%; and Tier 3–20%

By Designation: CLevel–35%; Directors–25%; and Others–40%

By Region: North America–40%; Europe–20%; AsiaPacific–30%; Middle East & Africa–5%; and South America–5%

Kongsberg Maritime (Norway), Northrop Grumman Corporation (US), L3Harris (US), Raytheon Technologies (US), Thales Group (France), Lockheed Martin (US), and Raytheon Technologies (US) are some of the leading players operating in the sonar systems market report.

Research Coverage

The study covers the sonar systems market across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on application, platform, installation, solution, and region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

Reasons to Buy this Report

This report is expected to help market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall sonar systems market and its segments. This study is also expected to provide regionwise information about the end use, and wherein sonar systems are used. This report aims at helping the

stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses and plan suitable go-to-market strategies. This report is also expected to help them understand the pulse of the market and provide them with information on key drivers, restraints, challenges, and opportunities influencing the growth of the market.

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*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

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