

# Sonobuoy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Active, Passive, Special Purpose), By Application Type (Commercial, Defense), By Region & Competition, 2021-2031F

<https://marketpublishers.com/r/S4D93B1335C2EN.html>

Date: January 2026

Pages: 182

Price: US\$ 4,500.00 (Single User License)

ID: S4D93B1335C2EN

## Abstracts

The Global Sonobuoy Market is projected to expand from USD 347.21 Million in 2025 to USD 486.42 Million by 2031, registering a compound annual growth rate (CAGR) of 5.78%. Sonobuoys, which are expendable acoustic sensor systems launched from maritime patrol aircraft or surface vessels, serve as the primary tactical sensors for anti-submarine warfare by detecting, classifying, and localizing underwater threats. The market is fundamentally propelled by rising geopolitical tensions and the rapid advancement of submarine capabilities among major naval powers, creating a critical need for continuous maritime domain awareness. This robust demand environment mirrors broader defense trade dynamics; the Aerospace Industries Association reported that U.S. aerospace and defense exports reached \$138.6 billion in 2024, illustrating the sustained surge in international procurement of essential security assets, including underwater surveillance technologies.

Despite this strong demand, the market encounters significant hurdles regarding the industrial base's ability to ramp up production during high-intensity operations. The reliance on specialized supply chains for precision acoustic components exposes vulnerabilities, where manufacturing limitations may prevent the rapid replenishment of stockpiles required for extended naval engagements, potentially impeding the market's ability to fully capitalize on global requirements.

## Market Driver

The expansion of global naval defense budgets acts as a primary catalyst for the sonobuoy market, driven by the urgent necessity to replenish stockpiles and modernize anti-submarine warfare (ASW) inventories. As nations increase fiscal allocations to counter underwater threats, procurement contracts are scaling significantly to ensure readiness for high-intensity maritime operations. This trend is exemplified by major procurement activities; according to GovCon Wire in December 2024, in the article 'Sparton Books \$107M Navy Contract Option for Sonobuoy Production,' Sparton secured a \$107.1 million contract modification from the U.S. Navy to produce AN/SSQ-125 sonobuoys. This budgetary prioritization extends beyond the United States, reflecting a coordinated effort among NATO allies to secure sovereign supply chains, underscored by Naval Today's report that in 2025, Ultra Maritime received an \$18 million contract from the UK Ministry of Defence to supply acoustic sensors for the Royal Navy's Merlin maritime patrol helicopters.

Furthermore, rising geopolitical tensions and regional disputes, particularly in the Indo-Pacific, are accelerating market momentum as nations seek to monitor adversarial submarine movements within contested waters. The proliferation of subsurface assets by rival powers has compelled regional actors to rapidly enhance their maritime domain awareness through direct foreign military sales and technology transfers. This strategic urgency is evident in recent transactional data; according to The News Minute in December 2025, in the 'US issues federal notification for \$52.8 million sale of anti-submarine sonobuoys to India' report, the U.S. government approved a foreign military sale valued at \$52.8 million to equip the Indian Navy with advanced sonobuoys. Such acquisitions highlight how regional instability directly translates into sustained operational demand for expendable acoustic systems to safeguard exclusive economic zones.

## **Market Challenge**

The industrial base's constrained capacity to surge production during periods of high-intensity demand presents a critical challenge that directly hampers the growth of the Global Sonobuoy Market. While geopolitical tensions drive naval forces to increase procurement orders, the market's expansion is mechanically throttled by the inability of manufacturers to rapidly scale output. This production bottleneck prevents the timely fulfillment of contracts, thereby delaying revenue recognition and limiting the overall market volume that would otherwise be realized in such a high-demand environment.

This constraint is deeply rooted in supply chain fragilities, particularly the reliance on a narrow tier of specialized component providers. According to the National Defense

Industrial Association, in 2024, 49 percent of defense sector respondents identified single or sole-source suppliers as a primary supply chain vulnerability, while 38 percent specifically cited capacity constraints. For the sonobuoy market, which depends on high-volume production of precision expendables, these industrial limitations mean that even with funded requirements, the supply chain lacks the elasticity to replenish stockpiles quickly. This effectively places a hard cap on market growth, preventing the industry from fully capitalizing on the surge in global defense spending.

## **Market Trends**

The deployment of Hybrid Active-Passive Multi-Mode Sensor Systems is transforming the Global Sonobuoy Market by consolidating typically separate acoustic capabilities into single, autonomous units. This trend addresses the operational need to detect quiet, diesel-electric submarines in littoral waters, where traditional passive-only sensing is often insufficient. By integrating high-power low-frequency transmitters with high-directivity passive receivers, these hybrid buoys enable multistatic operations that significantly expand detection ranges and tactical flexibility. This technological shift is gaining commercial traction; according to Naval Today in January 2025, in the 'Thales to supply French Navy with anti-submarine warfare sonobuoys' report, the French defense procurement agency (DGA) ordered several hundred SonoFlash units, which are the first mass-produced sonobuoys to combine active and passive modes in a single buoy.

Concurrently, the integration of sonobuoys with Unmanned Aerial and Surface Platforms is reshaping deployment strategies, driven by the development of miniaturized G-size form factors. Naval forces are increasingly utilizing Unmanned Aerial Vehicles (UAVs) to distribute acoustic fields, necessitating lighter, more compact sensors that do not compromise on endurance or performance. This integration facilitates persistent, remote maritime surveillance while reducing the risk to manned patrol aircraft. The demand for such advanced, endurance-focused capabilities is evident in recent contracts; according to Naval News in April 2025, in the 'Ultra Maritime to provide active and passive sonobuoys to France' report, Ultra Maritime secured a deal to supply next-generation sonobuoys featuring battery technology that nearly doubles the operational life of active units, a critical enhancement for sustained unmanned operations.

## **Key Market Players**

General Dynamics Mission Systems

Radixon Group Pty. Ltd.

SeaLandAire Technologies, Inc.

Sparton Corporation

Ultra Electronics Holdings Limited

Lockheed Martin Corporation

BAE Systems plc

Leonardo S.p.A.

QinetiQ Limited

Naval Group

## **Report Scope**

In this report, the Global Sonobuoy Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Sonobuoy Market, By Type

Active

Passive

Special Purpose

### Sonobuoy Market, By Application Type

Commercial

Defense

## Sonobuoy Market, By Region

### North America

United States

Canada

Mexico

### Europe

France

United Kingdom

Italy

Germany

Spain

### Asia Pacific

China

India

Japan

Australia

South Korea

### South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

### **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Sonobuoy Market.

### **Available Customizations:**

Global Sonobuoy Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

## Contents

### 1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### 2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### 3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### 4. VOICE OF CUSTOMER

### 5. GLOBAL SONOBUOY MARKET OUTLOOK

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Type (Active, Passive, Special Purpose)
  - 5.2.2. By Application Type (Commercial, Defense)
  - 5.2.3. By Region
  - 5.2.4. By Company (2025)

### 5.3. Market Map

## 6. NORTH AMERICA SONOBUOY MARKET OUTLOOK

### 6.1. Market Size & Forecast

#### 6.1.1. By Value

### 6.2. Market Share & Forecast

#### 6.2.1. By Type

#### 6.2.2. By Application Type

#### 6.2.3. By Country

### 6.3. North America: Country Analysis

#### 6.3.1. United States Sonobuoy Market Outlook

##### 6.3.1.1. Market Size & Forecast

###### 6.3.1.1.1. By Value

##### 6.3.1.2. Market Share & Forecast

###### 6.3.1.2.1. By Type

###### 6.3.1.2.2. By Application Type

#### 6.3.2. Canada Sonobuoy Market Outlook

##### 6.3.2.1. Market Size & Forecast

###### 6.3.2.1.1. By Value

##### 6.3.2.2. Market Share & Forecast

###### 6.3.2.2.1. By Type

###### 6.3.2.2.2. By Application Type

#### 6.3.3. Mexico Sonobuoy Market Outlook

##### 6.3.3.1. Market Size & Forecast

###### 6.3.3.1.1. By Value

##### 6.3.3.2. Market Share & Forecast

###### 6.3.3.2.1. By Type

###### 6.3.3.2.2. By Application Type

## 7. EUROPE SONOBUOY MARKET OUTLOOK

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Type

#### 7.2.2. By Application Type

#### 7.2.3. By Country

### 7.3. Europe: Country Analysis

- 7.3.1. Germany Sonobuoy Market Outlook
  - 7.3.1.1. Market Size & Forecast
    - 7.3.1.1.1. By Value
  - 7.3.1.2. Market Share & Forecast
    - 7.3.1.2.1. By Type
    - 7.3.1.2.2. By Application Type
- 7.3.2. France Sonobuoy Market Outlook
  - 7.3.2.1. Market Size & Forecast
    - 7.3.2.1.1. By Value
  - 7.3.2.2. Market Share & Forecast
    - 7.3.2.2.1. By Type
    - 7.3.2.2.2. By Application Type
- 7.3.3. United Kingdom Sonobuoy Market Outlook
  - 7.3.3.1. Market Size & Forecast
    - 7.3.3.1.1. By Value
  - 7.3.3.2. Market Share & Forecast
    - 7.3.3.2.1. By Type
    - 7.3.3.2.2. By Application Type
- 7.3.4. Italy Sonobuoy Market Outlook
  - 7.3.4.1. Market Size & Forecast
    - 7.3.4.1.1. By Value
  - 7.3.4.2. Market Share & Forecast
    - 7.3.4.2.1. By Type
    - 7.3.4.2.2. By Application Type
- 7.3.5. Spain Sonobuoy Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Type
    - 7.3.5.2.2. By Application Type

## **8. ASIA PACIFIC SONOBUOY MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast
  - 8.2.1. By Type
  - 8.2.2. By Application Type
  - 8.2.3. By Country

- 8.3. Asia Pacific: Country Analysis
  - 8.3.1. China Sonobuoy Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Type
      - 8.3.1.2.2. By Application Type
  - 8.3.2. India Sonobuoy Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Type
      - 8.3.2.2.2. By Application Type
  - 8.3.3. Japan Sonobuoy Market Outlook
    - 8.3.3.1. Market Size & Forecast
      - 8.3.3.1.1. By Value
    - 8.3.3.2. Market Share & Forecast
      - 8.3.3.2.1. By Type
      - 8.3.3.2.2. By Application Type
  - 8.3.4. South Korea Sonobuoy Market Outlook
    - 8.3.4.1. Market Size & Forecast
      - 8.3.4.1.1. By Value
    - 8.3.4.2. Market Share & Forecast
      - 8.3.4.2.1. By Type
      - 8.3.4.2.2. By Application Type
  - 8.3.5. Australia Sonobuoy Market Outlook
    - 8.3.5.1. Market Size & Forecast
      - 8.3.5.1.1. By Value
    - 8.3.5.2. Market Share & Forecast
      - 8.3.5.2.1. By Type
      - 8.3.5.2.2. By Application Type

## **9. MIDDLE EAST & AFRICA SONOBUOY MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Type
  - 9.2.2. By Application Type

- 9.2.3. By Country
- 9.3. Middle East & Africa: Country Analysis
  - 9.3.1. Saudi Arabia Sonobuoy Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Type
      - 9.3.1.2.2. By Application Type
  - 9.3.2. UAE Sonobuoy Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Type
      - 9.3.2.2.2. By Application Type
  - 9.3.3. South Africa Sonobuoy Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Type
      - 9.3.3.2.2. By Application Type

## **10. SOUTH AMERICA SONOBUOY MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Type
  - 10.2.2. By Application Type
  - 10.2.3. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Sonobuoy Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Type
      - 10.3.1.2.2. By Application Type
  - 10.3.2. Colombia Sonobuoy Market Outlook
    - 10.3.2.1. Market Size & Forecast
      - 10.3.2.1.1. By Value

- 10.3.2.2. Market Share & Forecast
  - 10.3.2.2.1. By Type
  - 10.3.2.2.2. By Application Type
- 10.3.3. Argentina Sonobuoy Market Outlook
  - 10.3.3.1. Market Size & Forecast
    - 10.3.3.1.1. By Value
  - 10.3.3.2. Market Share & Forecast
    - 10.3.3.2.1. By Type
    - 10.3.3.2.2. By Application Type

## **11. MARKET DYNAMICS**

- 11.1. Drivers
- 11.2. Challenges

## **12. MARKET TRENDS & DEVELOPMENTS**

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

## **13. GLOBAL SONOBUOY MARKET: SWOT ANALYSIS**

## **14. PORTER'S FIVE FORCES ANALYSIS**

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

## **15. COMPETITIVE LANDSCAPE**

- 15.1. General Dynamics Mission Systems
  - 15.1.1. Business Overview
  - 15.1.2. Products & Services
  - 15.1.3. Recent Developments
  - 15.1.4. Key Personnel
  - 15.1.5. SWOT Analysis

- 15.2. Radixon Group Pty. Ltd.
- 15.3. SeaLandAire Technologies, Inc.
- 15.4. Sparton Corporation
- 15.5. Ultra Electronics Holdings Limited
- 15.6. Lockheed Martin Corporation
- 15.7. BAE Systems plc
- 15.8. Leonardo S.p.A.
- 15.9. QinetiQ Limited
- 15.10. Naval Group

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

## I would like to order

Product name: Sonobuoy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Active, Passive, Special Purpose), By Application Type (Commercial, Defense), By Region & Competition, 2021-2031F

Product link: <https://marketpublishers.com/r/S4D93B1335C2EN.html>

Price: US\$ 4,500.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/S4D93B1335C2EN.html>