Unmanned Sea Systems Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 100 pages | Mordor Intelligence

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Report description:

The unmanned sea systems market is projected to register a CAGR of 15.59% during the forecast period.

The COVID-19 pandemic moderately impacted the market in focus. Though supply chain issues and delays in R&D efforts are visible in the unmanned sea systems industry across the world, no visible impact was noted on the orders placed by various militaries globally.

The use of unmanned systems for intelligence, surveillance, and reconnaissance missions, along with the water bodies of countries, gained importance over the past few years. With the naval forces prioritizing the development and procurement of unmanned systems, the demand for unmanned sea systems is anticipated to propel the market's growth during the forecast period.

Also, there is a substantial growth in commercial applications like hydrology research, scientific exploration, hydrographic survey, emergency fire control, and other applications, which is likely to drive the market's growth in the coming years.

The investments in using emerging technologies, like artificial intelligence and machine learning, in unmanned sea systems to convert the existing systems into autonomous are increasing. Such investments by the governments are bringing various companies together to develop advanced autonomous vehicles, thereby increasing the consolidation in the market.

Unmanned Sea Systems Market Trends

Autonomous Vehicles May Experience Significant Growth During the Forecast Period

The autonomous vehicle segment of the market is expected to register the highest CAGR during the forecast period. With the increasing technological advancements, companies are introducing artificial intelligence (AI) and machine learning technologies to increase the level of autonomy in unmanned surface vessels and underwater vehicles. Currently, there is a substantial investment in the development of new autonomous vehicles to convert the existing remotely controlled vehicles into autonomous vehicles, minimize human interference, and increase the efficiency of vehicles. For instance, XOCEAN, an uncrewed surface vessel operator, incorporated GUARDIAN Vision AI software of Marine AI in March 2021 to enhance the situational awareness of its surface vessel fleet. The software utilizes data from the onboard camera to detect and classify hazards and provide positional information on these hazards to the onboard control system and the remote pilot. In the military sector, China, the United States, France, Germany, and the Netherlands are rapidly expanding their fleet of autonomous surface and underwater vehicles. The rapid growth in the investments toward the development and procurement of autonomous maritime systems is expected to accelerate the market's growth during the forecast period.

Asia-Pacific is Expected to Generate the Highest Demand During the Forecast Period

Asia-Pacific is anticipated to witness the highest growth during the forecast period, majorly due to robust investments from countries like China, India, and Japan into unmanned systems. The navies in the region are investing in developing and procuring advanced unmanned sea systems for anti-submarine warfare and defense surveillance applications. For instance, as per the latest National Defense Program Guidelines, the Japanese MoD called for the development of a 10-m long UUV for conducting surveillance missions at the Senkaku Islands in the East China Sea, which are unlawfully claimed by China. Similarly, the Australian DoD initiated an R&D project worth USD 15 million to assess the design, development, and testing of AUV swarms and autonomous surface vessels for an initial survey of a hostile stretch for mines before the deployment of manned vessels. The project is scheduled to be completed by 2025. Various commercial operators in the region also plan to deploy remotely operated and autonomous vehicles for surveying, sea-bed mapping applications, etc. In this regard, about 40 Japanese shipping companies aim to have remote-control vessels ply Japanese waters by 2025 using satellites and high-speed fifth-generation wireless networks for communication between shore and ship and AI to help set efficient routes. The technological advancements in unmanned systems may lower the associated costs and drive the adoption of such systems in the region during the forecast period.

Unmanned Sea Systems Market Competitor Analysis

The unmanned sea systems market is highly fragmented, with many start-ups and local players catering to the unmanned surface and underwater system requirements of civilian and military customers. General Dynamics Corporation, Teledyne Technologies Incorporated, Thyssenkrupp AG, BAE Systems PLC, and Kongsberg Gruppen ASA are some of the prominent players in the market. Various companies have been collaborating on the development of autonomous features, as well as sophisticated acoustic and imaging sensors (like cameras, radar, sonar, and GPS) to decrease the pilot involvement operation of the systems in complex, variable, and communications-limited environments. Also, major international shipbuilding and technology companies have been investing in acquiring stakes in UUV/USV manufacturers to enter the market studied.

In October 2022, BAE Systems Inc. announced that they have introduced its Adaptable Strike Frigate (ASF) concept design to the European naval market at the Euronaval exhibition at Paris Le Bourget with the platform itself centered around modularity and autonomous systems.

Such developments are anticipated to support the growth of the USV/UUV manufacturers in the coming years.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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