

## **Asia-Pacific Military Unmanned Vehicles Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 85 pages | Mordor Intelligence

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### **Report description:**

The Asia-Pacific military unmanned vehicles market is expected to record a CAGR of 8.5% during the forecast period 2022-2031.

The impact of the COVID-19 pandemic on the Asia-Pacific military unmanned vehicles market was negligible as the investments by countries in the region toward the development and acquisition of new unmanned vehicles for combat and non-combat missions remained unaffected.

Due to the ongoing border tensions and geopolitical issues between neighboring countries in the region, the military expenditure of the countries has increased robustly over the past decade. The growing military spending is fueling the procurement and induction of unmanned systems and maintenance of the fleet of UAVs, UUVs, and UGVs for critical missions to reduce the casualties on the battlefield.

The growing emphasis on indigenous manufacturing of defense equipment in countries like China, India, and South Korea has led to regional players partnering with global players to enhance their local manufacturing of unmanned vehicle systems.

The companies are also investing in the integration of emerging technologies, like artificial intelligence (AI) and machine learning, into unmanned vehicles to introduce autonomous capabilities into existing remotely piloted vehicles and develop new autonomous unmanned vehicles.

APAC Military Unmanned Vehicles Market Trends

Unmanned Surface and Underwater Vehicles Segment Expected to Witness Robust Growth During the Forecast Period

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The unmanned surface and underwater vehicles segment of the market is estimated to witness the highest growth during the forecast period owing to the increasing investments toward the development and procurement of unmanned sea vessels for strategic and tactical superiority in the water. For instance, China is currently developing large, smart, and relatively low-cost unmanned submarines with long endurance capacity to perform a wide range of missions, ranging from reconnaissance to mine placement to even suicide attacks against enemy vessels. Similarly, to counter the threat of manned and unmanned vessels of the People's Liberation Army Navy (PLAN), the countries in the region are robustly adopting unmanned sea vessel technology. As part of strengthening maritime capabilities, Japan is currently focusing on its OZZ-5 Unmanned Underwater Vehicle (UUV), an autonomous underwater vehicle. The UUV is 4 m long and 50 cm in diameter with a continuous mission life of nine hours and a maximum speed of seven knots. Mitsubishi Heavy Industries Ltd is the prime contractor of OZZ-5 UUV. The UUV is expected to be operated alongside a new unmanned surface vessel (USV) (currently being developed by Japan Marine United (JMU) Defense Systems) for mine countermeasure missions. Such development of new models and planned deployment during the forecast period is anticipated to accelerate the market's growth during the forecast period.

#### China Held the Highest Market Share in 2021

China held the largest share in the market in 2021 since it accounted for the highest military expenditure in the Asia-Pacific region. The country's military spending increased from USD 196.54 billion in 2015 to USD 252.3 billion in 2020. China boosted its defense budget for FY 2021 by 6.8% compared to FY 2020 as it continued to modernize and strengthen its armed forces. Tensions with Taiwan, India, and the United States have pushed China to advance in unmanned technology across all platforms. In recent years, China also pushed for the Hongdu GJ-11 and other equivalent UCAVs to enter serial production in 2022 and open a second GJ-11 production line under the 15th Five-Year Plan to reach the goal of 200 operational long-range UCAVs by 2030. Considering the rate at which China is advancing in terms of UAVs, it is estimated that the country will account for almost 25% of global military unmanned aerial vehicles by 2024. In recent years, the country also entered the unmanned underwater vehicles market and deployed these systems in the Indian Ocean and the South China Sea. China's Sea Wing Gliders are similar to UUVs deployed by the US Navy's Littoral Battlespace Sensing-Glider. China is also working to incorporate artificial intelligence and UUV technology to boost its submarine capabilities. Such development of new unmanned systems and the growing procurement of these systems by Chinese military forces are expected to drive the market's growth in the country.

#### APAC Military Unmanned Vehicles Market Competitor Analysis

The Asia-Pacific unmanned vehicles market is dominated by local players like Defence Research and Development Organisation (DRDO), Mitsubishi Heavy Industries Ltd, and Singapore Technologies Engineering Ltd, among others. Nevertheless, some international players like The Boeing Company, Elbit Systems Ltd, General Atomics, etc., also have a presence in the market. With a growing emphasis on local manufacturing capabilities, local companies are expanding their product portfolio to strengthen the capabilities of local armed forces. For instance, in December 2021, Korean Air entered a partnership with the Korea Research Institute for Defense Technology Planning and Advancement (KRIT) to research and develop technology for broadband stealth unmanned aerial vehicles (UAV). The agreement is expected to run through 2025, and the airline will work on the integration of high-performance low-observable technology into UAVs. Similarly, Torus Robotic Pvt. Ltd formed a partnership with Bharat Earth Movers Limited in February 2021 to develop a 750 kg autonomous UGV for logistics and surveillance applications, which can be deployed in extreme weather and terrain conditions. The companies are also working on the integration of unmanned technologies, including self-driving, obstacle detection/avoidance, and surveillance. Such developments are anticipated to support the growth of companies over the coming years.

#### Additional Benefits:

The market estimate (ME) sheet in Excel format

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