

Europe AUV - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe AUV Market is expected to register a CAGR of greater than 6.9% during the forecast period.

The COVID-19 pandemic negatively impacted the market in 2020. Presently, the market has reached pre-pandemic levels.

Key Highlights

- Factors such as rising oil and gas production activities, growing offshore wind power electricity generation, and increasing oil and gas decommissioning activities are expected to drive the AUV market during the forecast period.
- On the other hand, countries planning to increase their focus on climate change and ban offshore exploration activities are expected to hinder market growth.
- Nevertheless, the rising deepwater and ultra-deepwater discoveries are expected to open up new opportunities for the European AUV market.
- With rising oil and gas investments, especially in the upstream sector, Norway is expected to witness significant growth and dominate the market.

Europe AUV Market Trends

Oil and Gas Segment to Dominate the Market

- Europe's dependence on oil and gas is on the rise as significant regional economies still rely heavily on petroleum-based

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products. The oil and gas industry vastly influences the region's politics and economics.

- The oil production in Europe decreased from 3,596 thousand barrels per day in 2015 to 3,420 thousand barrels per day in 2021. However, the region is witnessing a significant boom in upcoming oil and gas projects in the United Kingdom and Norway, which will uplift the AUV market's growth.
- Oil and gas drilling rigs can operate in water depths of two miles. Many of these deepwater wells and pipeline systems rely on unmanned underwater vehicles to help perform installations, inspections, repairs, and maintenance.
- Monitoring and deployment are often challenging in adverse subsea conditions, creating operational, environmental, and technical challenges. These factors are accelerating the development of new technologies in the AUV market. Also, AUVs provide positioning and guidance to sub-sea infrastructure construction, monitoring, and survey missions.
- Moreover, in March 2022, Kongsberg Gruppen ASA, a Norway-based international technology company, announced the launch of an upgraded version of the Hugin AUV with innovative technologies, including 3D sensing, trajectory planning, and collision avoidance systems, which is highly preferred in oil and gas sector for detecting and mapping oil reserves.
- Furthermore, in January 2022, oil and gas major, TotalEnergies partnered with iXblue, a global provider of innovative solutions for navigation, photonics, and maritime autonomy, to demonstrate collaborative uncrewed capabilities for subsea inspection and asset survey missions. According to iXblue, trials were conducted off the coast of La Ciotat in the south of France, deploying two uncrewed platforms: iXblue DriX Uncrewed Surface Vehicle (USV) and Teledyne Gavia Autonomous Underwater Vehicle (AUV).
- Therefore, the oil and gas sector is expected to dominate the European AUV market during the forecast period.

Norway is Expected to Dominate the Market

- Norway has rich natural gas reserves. As of 2021, the country was the topmost producer of natural gas. Norway has also displaced Russia as the top supplier of NatGas to the European Union as energy supply chains are rejiggered.
- In 2022, natural gas demand was expected to recover to its pre-crisis levels. The demand was also anticipated to increase slightly across the country during the forecast period. In 2021, natural gas production in the country was approximately 114.3 billion cubic meters (bcm). Such production levels promoted the growth in the utilization of AUVs for detecting and mapping oil reserves across the country.
- To meet the demand and offset, the operators in the North Sea are undertaking a production decline from maturing assets and investments in new gas fields. These new project sanctions would directly impact the drilling activity over the next three years, with more than 20 developing well associated with these projects.
- Additionally, in March 2022, Norway-based Kongsberg Maritime presented their newly launched medium-sized autonomous underwater vehicle, HUGIN Edge, at the Oceanology International Event in London. The design of the AUV combined elements of HUGIN's carbon monocoque approach coupled with hydrodynamic modeling to refine the hull's low-drag shape. It can be deployed from a USV (uncrewed surface vessel), small surface vessels, and from the shore.
- In October 2021, Floor Geophysics (OFG) and DOF Subsea of Norway (DOF) entered into a strategic alliance to provide AUV services to the global offshore industry.
- Owing to the above points, Norway is expected to dominate the European AUV market during the forecast period.

Europe AUV Industry Overview

The European AUV market is moderately fragmented in nature. Some of the major players in the market (in no particular order) include DOF Subsea AS, Fugro NV, RTSYS, Saipem SpA, and Oceaneering International Inc.

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

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