Unmanned Sea Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Unmanned Sea Systems Market size is estimated at USD 2.62 billion in 2025, and is expected to reach USD 4.99 billion by 2030, at a CAGR of 13.78% during the forecast period (2025-2030).

Key Highlights
- With the growth in maritime tensions, several nations are investing huge amounts in enhancing their maritime surveillance and warfighting capabilities, supported by the growth in defense spending. Factors like the growth in defense spending, increasing focus on the development of sophisticated unmanned sea systems, and the growing adoption of unmanned vessels for various non-military applications are expected to drive the market growth. On the other hand, the technological challenges in the development of unmanned sea systems are projected to impact the market growth potential.
- The adoption of unmanned systems has also increased in various non-military or commercial sectors. They can be used for oceanography, hydrology research, scientific exploration, hydrographic surveys, emergency fire monitoring, control in oil rigs, and other tasks. Several players in the industry believe that autonomous shipping is the future of the maritime industry, which is presumed to supplement the growth of unmanned sea systems over the assessment period.

Unmanned Sea System Market Trends

Remotely Operated Vehicles (ROVs) Segment Will Showcase Significant Growth During the Forecast Period

- A remotely operated vehicle (ROV) is unmanned and usually tethered to the operator. It is used to collect data about

underwater subsea structures or geological formations like hydrothermal vents. It has a remote pilot and automated control technology, which makes it safe and easy to operate. ROVs are often used when diving by humans is either impractical or dangerous, such as working in deep water or investigating submerged hazards. These ROVs are used for various commercial as well as defense applications.
- ROVs are used for ocean exploration and provide HD images and high-definition videos for research and study purposes. These vehicles are fitted with additional equipment such as manipulator arms, water samplers, and others. Key players are focusing on the introduction of advanced technologies in ROVs to improve operational efficiency and thus drive market growth.
- For instance, in July 2022, Oceaneering International Ltd. announced that its Subsea Robotics segment was awarded a multi-year service contract supporting Petrobras projects off the coast of Brazil. Under the contract, the company will provide survey and ROV services for AKOFS Offshore's subsea equipment. The scope of work includes the provision of two work class ROVs, ROV personnel for simultaneous operations, tooling packages for each ROV, and survey equipment and personnel.
- Also, in June 2021, Deep Trekker, a Canadian-based company, launched a new submersible remotely operated vehicle (ROV) called the Pivot. It is equipped with six thrusters powered by lithium-ion batteries, which provide high power, stability, enhanced speed, and control. It can be used for various applications such as search and rescue, aquaculture, defense, shipping, and others. Thus, the growing demand for ROVs for numerous applications such as underwater surveys, search and rescue, military, deepwater research, and others boosts the growth of the market.

Asia Pacific is Projected to Show Highest Growth 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 a part of the five-year ocean policy, the Japanese government is planning to promote the development of unmanned underwater drones to strengthen maritime security against China's increasing military assertiveness.
- 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. 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 System Industry Overview

The unmanned sea systems market is semi-consolidated in nature with a presence of few players holding significant shares in the market. Some of the key players in the market are General Dynamics Corporation, Teledyne Technologies Incorporated, BAE Systems plc, thyssenkrupp AG, and Kongsberg Gruppen ASA. 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. For instance, in July 2023, Garden Reach Shipbuilders and Engineers (GRSE), an Indian state-owned shipyard, launched Neerakshi, an autonomous underwater vehicle (AUV).

Additional Benefits:

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

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