

## **Unmanned Marine Vehicles - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-08-01 | 125 pages | Mordor Intelligence

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### **Report description:**

Unmanned Marine Vehicles Market Analysis

The unmanned marine vehicles market size is estimated at USD 5.14 billion in 2025 and is expected to reach USD 7.75 billion by 2030, advancing at an 8.56% CAGR. Heightened naval modernization programs, an expanding offshore energy footprint, and surging demand for persistent ocean-data collection underpin this growth trajectory. Uncrewed platforms are shifting from experimental tools to indispensable assets that extend the reach of defense forces, lower inspection costs for oil, gas, and wind operators, and widen the scope of long-duration climate missions. Intensifying geopolitical flashpoints spur procurement of stealthy undersea systems, while sustainability mandates accelerate the pivot toward low-emission powertrains. Venture-capital-backed start-ups inject rapid-iteration culture into a field dominated by defense primes, enabling faster prototype cycles and driving double-digit order books for smaller, swarm-capable craft. Ecosystem participants increasingly view software-autonomy algorithms and data-fusion engines as the decisive differentiator for next-generation fleets.

Global Unmanned Marine Vehicles Market Trends and Insights

Increased Defense Investments in ISR and Anti-Submarine Warfare Capabilities

Escalating maritime tensions drive navies to bankroll sophisticated unmanned fleets that plug coverage gaps in contested waters. The US Navy budgeted USD 177.3 million for uncrewed systems in fiscal 2025, with the Replicator initiative targeting mass production of autonomous undersea craft. Anduril's Rhode Island plant can now roll out more than 200 Dive-LD vehicles annually.

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Parallel programs such as Australia's Ghost Shark and India's XLUUV tender reinforce a multi-regional procurement wave. European alignment is visible in France's Naval Group drone demonstrators, underpinning future cooperative under-ice operations. Combat success stories from the Black Sea validate operational concepts and compress acquisition timelines, while Taiwan and Norway expand indigenous production to address local threat matrices.

#### Growing Utilization of UUVs for Offshore Oil and Gas Inspection and Maintenance

Energy majors now deploy autonomous underwater vehicles (AUVs) that slice inspection outlays by up to 55% compared with tethered ROVs. TotalEnergies' pilot of remotely controlled robots illustrates the shift toward onshore command hubs that cut offshore headcount. AUVs accelerate anomaly detection, shorten dry-dock intervals, and halve environmental footprints, prompting Gulf operators and North Sea contractors to retrofit digital twins for predictive maintenance. Renewable-powered uncrewed surface vessels in the UAE merge decarbonization goals with automation efficiencies. Conceptual studies such as DNV's Solitude envisage fully unmanned floating LNG units realizing 20% operating-cost savings.

#### Significant Capital Expenditure and Operational Cost Burdens

Price tags for large uncrewed surface vehicles reach USD 250 million per hull, while the US Navy's XLUUV program alone will draw USD 21.5 million in FY 2025. Hydrogen-fuel-cell AUV concepts eliminate emissions but demand bespoke bunkering and inflate upfront budgets. Nauticus Robotics posted a USD 50.7 million loss in 2023, underscoring the protracted payback period for breakthrough subsea morphing platforms. Venture rounds such as Blue Water Autonomy's USD 14 million seed highlight the steep capital ladder that early-stage innovators must climb before first revenue.

Other drivers and restraints analyzed in the detailed report include:

Expanding Use of Autonomous Systems in Oceanographic and Climate Research / Emerging Role of UUVs in Offshore Renewable Energy Operations and Maintenance / Lack of Harmonized Regulatory and Classification Frameworks /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Unmanned underwater vehicles (UUVs) retained 54.21% of the unmanned marine vehicles market share in 2024 while also logging the highest 11.17% CAGR through 2030, cementing their role as the sector's dual growth and revenue engine. Demand springs from anti-submarine warfare upgrades and deep-water infrastructure inspection, with China's typhoon-proof Blue Whale illustrating 30-day submerged endurance benchmarks.

Surface vehicles absorb the balance of the unmanned marine vehicles market but gain traction for coastal surveillance, mine countermeasures, and logistics. The United States' hybrid fleet model exploits persistent surface patrols to complement covert undersea assets. Convergence trends show submarine-launched UAVs and joint surface-subsurface tasking that rewrite traditional mission doctrines.

Medium craft secured 31.34% of 2024 revenue thanks to balanced payload-endurance profiles, yet micro vehicles sprint ahead at 10.01% CAGR, propelled by swarm robotics and barrier-free launch requirements. Compact nodes enable blanket coverage of littoral zones while minimizing attrition risk.

The modular design allows a scale-agnostic chassis where mission packs swap in at sea, blurring size boundaries. Soft-material thrusters and piezoelectric actuation sharpen maneuverability in confined pipelines and reef crevices. Swarm-based artificial reef

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monitoring in Cyprus validates month-long untended deployments, expanding biodiversity insights without research-vessel charters.

The Unmanned Marine Vehicles Market Report is Segmented by Vehicle Type (Unmanned Surface Vehicles (USVs), and Unmanned Underwater Vehicles (UUVs)), Vehicle Size (Micro, Small, and More), Propulsion (Diesel, Electric, and More), Control Type (Remotely Operated and Autonomous), Application (Defense and Security, and More), and Geography (North America, Europe, and More). The Market Forecasts are Provided in Terms of Value (USD).

## Geography Analysis

North America held 33.27% of 2024 revenue, underpinned by the Pentagon's multi-billion-dollar fleet recapitalization and venture-financed scale-ups such as Saronic's Louisiana shipyard producing 150-foot Marauder drones. Canada's Arctic programs and Mexico's deep-water Campeche inspections add incremental demand loops. The region benefits from a mature defense industrial base, AI talent pools, and early-adopter regulatory sandboxing.

Asia-Pacific registers the steepest 10.40% CAGR thanks to China's fleet buildup, Australia's AUKUS-linked Ghost Shark prototypes, and India's tender for 12 XLUUVs that extend maritime domain awareness. Collaborative projects, including Norway's decision to co-produce USVs in Ukraine, signal rising technology dispersion throughout the wider Indo-Pacific quadrant.

Europe leverages integrated shipbuilding clusters and cohesive R&D funding to sustain a robust pipeline of autonomous trials. The EU AI Act sets harmonization precedents that may translate into first-mover regulatory advantages. The United Kingdom evaluates Kongsberg Vanguard motherships for mine-hunting packages, while France's Naval Group anchors continental expertise in large-diameter hull forms.

## List of Companies Covered in this Report:

General Dynamics Mission Systems (General Dynamics Corporation) / Thales Group / BAE Systems plc / Northrop Grumman Corporation / Textron Inc. / L3Harris Technologies, Inc. / Kongsberg Gruppen ASA / Saab AB / Teledyne Technologies Incorporated / ATLAS ELEKTRONIK GmbH / Exail SAS / The Boeing Company / Ocean Aero, Inc. / SeaRobotics Corporation / Huntington Ingalls Industries, Inc. / Fugro N.V. / Anduril Industries, Inc. / Cellula Robotics Ltd. / Sea Machines Robotics Inc. /

## Additional Benefits:

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

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