

Maritime Security - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 110 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Maritime Security Market Analysis

The maritime security market was valued at USD 25.57 billion in 2025 and estimated to grow from USD 28.02 billion in 2026 to reach USD 44.29 billion by 2031, at a CAGR of 9.59% during the forecast period (2026-2031). Heightened piracy, cyber-enabled sabotage, and expanding regulatory mandates are steering budgets toward integrated surveillance, screening, and resilience platforms. North America retains leadership, supported by rigorous rules and modern port assets, while rapid offshore energy development and multilateral security programmes propel Asia-Pacific's double-digit growth. Operators are shifting from guard-based deterrence to AI-driven situational awareness, as 69 attacks in the Red Sea alone during November 2023-November 2024 exposed gaps in conventional patrol coverage. Insurance premiums on high-risk routes tripled, strengthening the commercial case for predictive threat-detection suites. Spending now prioritizes interoperable command platforms across ports, vessels, and coastal zones that fuse radar, AIS, video, and cyber analytics.

Global Maritime Security Market Trends and Insights

Rising Piracy and Maritime Threats

The hijackings of MV Ruen (2023) and MV Abdullah (2024) underlined how Somali criminal networks exploited naval redeployments in the Red Sea, reviving ransom-based models. The International Maritime Bureau logged 116 piracy incidents in 2024, and hostage cases tripled to 126 seafarers. This pressured operators to adopt autonomous surface drones monitored by the

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

US Navy's Task Force 59, which surpassed 50,000 unmanned operating hours. War-risk cover now costs three times pre-crisis levels, incentivising AI-enabled early-warning radars and persistent electro-optic payloads.

Stricter International Security Regulations

The modernised Global Maritime Distress and Safety System (GMDSS) entered force in January 2024, obliging fleets to replace legacy gear with digital communication suites for marine and offshore. In parallel, the US Coast Guard's July 2025 cybersecurity rule requires every vessel and facility to appoint a Cybersecurity Officer, unlocking a USD 600 million compliance opportunity. Belgium went further, mandating biometric gate control across 40 terminals handling 47,000 identities daily.

High Upfront Cost and Budget Constraints

Comprehensive perimeter fencing, biometric gates, and multilayer cargo screening can exceed USD 2 million per terminal, challenging smaller operators whose insurance bills already face 2.5-7.5% increases for 2025 renewals. Global marine insurance premium growth slowed as inflation eroded margins, curbing financing for capital-heavy upgrades.

Other drivers and restraints analyzed in the detailed report include:

Growth of Global Seaborne Trade Adoption of Integrated Surveillance and Screening Legacy Infrastructure Integration Complexity

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

Segment Analysis

Surveillance and tracking held 34.41% revenue in 2025, anchoring the maritime security market as operators require continuous domain awareness. Command-and-control (C2) suites are projected to grow 11.28% annually, reflecting the need to orchestrate autonomous surface drones and integrate satellite SAR feeds into a single picture. Saab's pact with ICEYE underscores how cloud-delivered radar data reshapes tactical decisions. The maritime security market size for surveillance solutions is expected to scale with the broader industry, reaching significant double-digit gains by 2030. Edge analytics embedded in navigation radars allow software patching without hardware swaps, compressing lifecycle costs, and encouraging maritime digital twins for predictive maintenance.

Growing AI capability also elevates screening. OSI Systems' Eagle M60 contract signalled rising demand for mobile, high-energy drive-through scanners at feeder ports. Modernised GMDSS rules prompt a replacement cycle in maritime radios, driving cross-selling of encrypted data links. Cyber-hardened access systems mandated across Belgian ports validate biometric uptake as a regulatory rather than an optional requirement. As a result, the maritime security market continues to shift from siloed hardware toward modular, software-defined ecosystems, giving prime contractors and niche AI firms parallel growth avenues.

The Maritime Security Market Report is Segmented by System (Screening and Scanning, Communication Systems, Surveillance and Tracking, and More), Type (Port and Critical Infrastructure Security, and More), End User (Commercial Shipping Companies, Port Authorities and Terminal Operators, and More), and Geography (North America, Europe, Asia-Pacific, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America controlled 37.41% of 2025 revenue, underpinned by a mature port estate and stringent security codes. The new US Coast Guard cyber rule generates a USD 600 million compliance niche. At the same time, Lockheed Martin's AN/TPQ-53 radar

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

demonstrates how open-architecture software upgrades extend land-border devices into littoral monitoring. Canada's submarine recapitalisation plan and Mexico's adoption of integrated coastal radars add to continental demand.

Asia-Pacific is the fastest-growing theatre, advancing at an 11.05% CAGR as China scales offshore oil and India funds a USD 125 million domain-awareness project with the US Navy. Japan secured the first DNV cyber certificate for maritime radios prtmes.jp. South Korea unveiled the HCX-23 Plus drone-carrier concept, reflecting heavy naval R&D. These initiatives and Singapore's rollout of uncrewed harbour patrol boats illustrate state-level commitment to technology adoption.

Europe balances regulatory leadership with pragmatic deployment. The EU added the Red Sea and Gulf of Aden to special areas under MARPOL Annex I, obliging operators to fit additional pollution-control and security gear. Germany and Sweden intensified patrols against shadow-fleet tankers, while Belgium's biometric rollout sets a continental benchmark. Red Sea turbulence produced 19 pirate incidents in the Middle East and Africa in 2024, prompting Somaliland's Berbera Port upgrade as an alternative haven, meforum.org. Regional risk profiles determine whether operators favour hard-kill naval options or scalable surveillance grids, but every region converges on AI-enabled situational awareness as the core enabler.

List of Companies Covered in this Report:

Saab AB Thales Group Leonardo S.p.A Elbit Systems Ltd. Airbus SE BAE Systems plc Kongsberg Gruppen ASA Terma A/S Westminster Group Plc Smiths Detection Group Limited (Smiths Group plc) OSI Maritime Systems Nuctech Technology Co., Ltd. ATLAS ELEKTRONIK GmbH ARES Security Corporation HGH Systemes Infrarouges SAS HALO Maritime Defense Systems Teledyne Technologies Incorporated Honeywell International Inc.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Rising piracy and maritime threats

4.2.2 Stricter international security regulations

4.2.3 Growth of global seaborne trade

4.2.4 Adoption of integrated surveillance and screening

4.2.5 Security-linked insurance premium incentives

4.2.6 ESG-linked financing drives cyber-resilience

4.3 Market Restraints

4.3.1 High upfront cost and budget constraints

- 4.3.2 Legacy infrastructure integration complexity
- 4.3.3 Data-privacy and sovereignty concerns
- 4.3.4 Maritime-cyber talent shortage
- 4.4 Value Chain Analysis
- 4.5 Regulatory Landscape
- 4.6 Technological Outlook
- 4.7 Porter's Five Forces Analysis
 - 4.7.1 Bargaining Power of Buyers
 - 4.7.2 Bargaining Power of Suppliers
 - 4.7.3 Threat of New Entrants
 - 4.7.4 Threat of Substitute Products
 - 4.7.5 Intensity of Competitive Rivalry

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By System
 - 5.1.1 Screening and Scanning
 - 5.1.2 Communications Systems
 - 5.1.3 Surveillance and Tracking
 - 5.1.4 Access Control and Biometrics
 - 5.1.5 Command and Control (C2) Platforms
 - 5.1.6 Navigation Management and AIS
- 5.2 By Type
 - 5.2.1 Port and Critical Infrastructure Security
 - 5.2.2 Vessel Security
 - 5.2.3 Coastal and Border Security
- 5.3 By End User
 - 5.3.1 Commercial Shipping Companies
 - 5.3.2 Port Authorities and Terminal Operators
 - 5.3.3 Naval and Coast Guard
 - 5.3.4 Oil and Gas Offshore Operators
 - 5.3.5 Cruise and Ferry Lines
- 5.4 By Geography
 - 5.4.1 North America
 - 5.4.1.1 United States
 - 5.4.1.2 Canada
 - 5.4.1.3 Mexico
 - 5.4.2 Europe
 - 5.4.2.1 Germany
 - 5.4.2.2 United Kingdom
 - 5.4.2.3 France
 - 5.4.2.4 Italy
 - 5.4.2.5 Russia
 - 5.4.2.6 Rest of Europe
 - 5.4.3 Asia-Pacific
 - 5.4.3.1 China
 - 5.4.3.2 Japan
 - 5.4.3.3 India

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.4.3.4 South Korea
- 5.4.3.5 Australia
- 5.4.3.6 Rest of Asia-Pacific
- 5.4.4 South America
 - 5.4.4.1 Brazil
 - 5.4.4.2 Rest of South America
- 5.4.5 Middle East and Africa
 - 5.4.5.1 Middle East
 - 5.4.5.1.1 United Arab Emirates
 - 5.4.5.1.2 Saudi Arabia
 - 5.4.5.1.3 Turkey
 - 5.4.5.1.4 Rest of Middle East
 - 5.4.5.2 Africa
 - 5.4.5.2.1 South Africa
 - 5.4.5.2.2 Rest of Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves and Developments
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)
 - 6.4.1 Saab AB
 - 6.4.2 Thales Group
 - 6.4.3 Leonardo S.p.A
 - 6.4.4 Elbit Systems Ltd.
 - 6.4.5 Airbus SE
 - 6.4.6 BAE Systems plc
 - 6.4.7 Kongsberg Gruppen ASA
 - 6.4.8 Terma A/S
 - 6.4.9 Westminster Group Plc
 - 6.4.10 Smiths Detection Group Limited (Smiths Group plc)
 - 6.4.11 OSI Maritime Systems
 - 6.4.12 Nuctech Technology Co., Ltd.
 - 6.4.13 ATLAS ELEKTRONIK GmbH
 - 6.4.14 ARES Security Corporation
 - 6.4.15 HGH Systemes Infrarouges SAS
 - 6.4.16 HALO Maritime Defense Systems
 - 6.4.17 Teledyne Technologies Incorporated
 - 6.4.18 Honeywell International Inc.

7 MARKET OPPORTUNITIES and FUTURE OUTLOOK

- 7.1 White-space and Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Maritime Security - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 110 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

| Select license | License | Price |
|----------------|--------------------------|-----------|
| | Single User License | \$4750.00 |
| | Team License (1-7 Users) | \$5250.00 |
| | Site License | \$6500.00 |
| | Corporate License | \$8750.00 |
| | | VAT |
| | | Total |

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

| | | | |
|---------------|----------------------|-------------------------------|----------------------|
| Email* | <input type="text"/> | Phone* | <input type="text"/> |
| First Name* | <input type="text"/> | Last Name* | <input type="text"/> |
| Job title* | <input type="text"/> | | |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address* | <input type="text"/> | City* | <input type="text"/> |
| Zip Code* | <input type="text"/> | Country* | <input type="text"/> |
| | | Date | 2026-02-11 |
| | | Signature | |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com