

Submarines - Market and Technology Forecast to 2031

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Abstracts

The return of great power politics is putting submarines in the spotlight once again. With the world drifting towards a Cold War redux, due to the Chinese assertiveness in the APAC region, the Russian aggressiveness in Ukraine and the High North, the submarines remain a credible deterrence, strike and ISR platform.

Moreover, the fact that around a third of the Earth's population lives near the coastline, as well as the fact that several of a state's infrastructure (harbours, telecommunication and internet cables) are in the littoral or passing from the bottom of the sea to connect continents and countries, in addition to natural resources, make the protection of those areas a difficult task.

Although the role of the submarines remains the same as in the past, the capabilities that these platforms integrate is gradually expanding. Besides their ability to operate under stealth, developing new subsystems and incorporating new technologies is crucial for them to remain at the forefront of competition. What is expected to strongly impact the market is the introduction of unmanned maritime systems (UMS) and technological enablers.

The industrial landscape is rather steady as the capability to design submarines remains confined to around eight and in the near future 10 countries, while production can include a few more shipbuilders who construct them under license. We would expect an increase in joint ventures or collaborations schemes among well-established shipyards and new clients (e.g. the Norwegian or Dutch submarines programmes), but limited efforts to build a new industrial capability from the ground. The SSN AUKUS is an exception to that, due to the political considerations associated with it.

Due to the long-term planning required in the shipbuilding of a submarine and the life-cycle which usually is between 30 and 40 years, competition among manufacturers is

stark.

Market Forecast's study "Submarines - Market and Technology Forecast to 2031" has collected the data on current submarines inventories, future programmes and analysed them to forecast the evolution of the market, its subsystems and technologies over the 2023-2031 period.

Covered in this report

Overview: Snapshot of the submarines technology in the market during 2023-2031, including highlights of the demand drivers, trends, and challenges. It also provides a snapshot of the spending with respect to regions as well as segments and sheds light on the emergence of new technologies.

Market Dynamics: Insights into the technological developments in the submarines system market and a detailed analysis of the changing preferences of governments around the world. It also analyses changing industry structure trends and the challenges faced by the industry participants.

Segment Analysis: Insights into the various systems market from a segmental perspective and a detailed analysis of factors influencing the market for each segment.

Regional Review: Insights into modernization patterns and budgetary allocation for top countries within a region.

Regional Analysis: Insights into the systems market from a regional perspective and a detailed analysis of factors influencing the market for each region.

Impact Analysis: Analysis on how certain events will impact the submarines market. This will give you an indication on which factors are important for the forecast.

Key Program Analysis: Details of the top programmes in each segment expected to be executed during the forecast period.

Competitive landscape Analysis: Analysis of competitive landscape of this industry. It provides an overview of key companies, together with insights such as key alliances, strategic initiatives, and a brief financial analysis.

Segmentation

The market is segmented by Type, Region, Propulsion, and Subsystem.

Type

SSBN

SSN

SSGN

SSP

SSK

TBD

Region

North America

Europe

Asia-Pacific

Middle East & Africa

South America

Propulsion

Nuclear-powered

Conventional-powered

Subsystems

Propulsion

Sonars

Electronics

Reasons to buy

Insight on the elements comprising a submarine, as they form part of an extensive supply chain outlined in the report

In-depth understanding of the factors affecting the market such as defence spending, operational requirements, challenges faced by manufacturers among several others

Outlining of the disruptions and the technology enablers impacting the market and how these could become an opportunity in this quick changing domain

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