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Unmanned Underwater Vehicles Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Shallow AUVs (up to 100 m), Medium AUVs (up to 1,000m), Large AUVs (more than 1,000m)), By Shape (Torpedo, Laminar Flow Body, Streamlined Rectangular Style, Multi-hull Vehicle), By Application (Collision Avoidance, Communication, Navigation, Propulsion, Imaging), By Region & Competition, 2021-2031F

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Abstracts

The Global Unmanned Underwater Vehicles Market is projected to experience substantial growth, expanding from a value of USD 4.85 Billion in 2025 to USD 11.32 Billion by 2031, reflecting a CAGR of 15.17%. This market consists of submersible systems, specifically remotely operated vehicles (ROVs) and autonomous underwater vehicles (AUVs), which are engineered to function without an onboard crew. The industry's expansion is primarily driven by the burgeoning offshore renewable energy sector, which requires regular subsea inspections, as well as increasing national defense budgets dedicated to improving surveillance and mine countermeasure capabilities. Additionally, the market is supported by a rising necessity for comprehensive seabed mapping and detailed oceanographic research utilizing these robotic solutions.

Public sector investment significantly underpins this industry; according to the Association for Uncrewed Vehicle Systems International, the U.S. Department of Defense requested approximately $10.95 billion in 2024 for the development and acquisition of uncrewed systems. Despite this strong financial foundation, the market

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faces a major obstacle in the form of technical limitations related to battery endurance and underwater communication bandwidth. These constraints currently restrict the autonomy and operational range of vehicles in complex deep-sea environments, thereby impeding broader market scalability.

Market Driver

The primary catalyst for the Global Unmanned Underwater Vehicles Market is the escalation of global defense budgets and naval modernization efforts, as nations prioritize autonomous systems to combat asymmetric maritime threats. Navies are increasingly deploying UUVs for intelligence, surveillance, and reconnaissance missions to improve undersea situational awareness while minimizing risks to personnel. This strategic pivot is supported by significant funding for core technology development; for instance, the U.S. Naval Institute noted that in the March 2025 'Report to Congress on Navy Large Unmanned Surface and Undersea Vehicles', the U.S. Navy requested an additional $68.2 million in FY2025 R&D funding specifically for UUV technologies, highlighting the reliance on robotic platforms for anti-submarine warfare and mine countermeasures.

Further propelling market demand is the rapid expansion of renewable energy infrastructure and offshore oil and gas exploration in deep-water environments. Energy companies are investing heavily in autonomous solutions capable of extended endurance and advanced sensing to inspect and maintain complex subsea assets. This commercial growth is evident in financial results from key players; Teledyne Technologies reported in April 2025 a $14.0 million rise in marine instrumentation sales driven by defense and offshore energy activity. Similarly, Oceaneering International reported in February 2025 that its Subsea Robotics segment achieved a quarterly operating income of $63.5 million, a 26% increase over the previous year, reflecting enhanced operational efficiency in the sector.

Market Challenge

A major barrier restricting the commercial scalability of the Global Unmanned Underwater Vehicles Market involves technical limitations regarding battery endurance and underwater communication bandwidth. These physical constraints significantly curtail the mission longevity and operational range of autonomous units, making them unsuitable for extended deep-sea campaigns without frequent surfacing or retrieval. Since electromagnetic waves attenuate rapidly in water, high-speed real-time data transmission is virtually impossible over distance, forcing operators to rely on expensive

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support vessels to physically retrieve data or stay within acoustic range. This requirement negates the cost advantages typically offered by unmanned systems and prevents the industry from transitioning toward fully autonomous, over-the-horizon workflows.

Consequently, the market remains heavily reliant on vessel-supported or tethered interventions rather than shifting to more efficient, untethered solutions. This dependence on conventional infrastructure is highlighted by the International Marine Contractors Association, which reported in 2024 that member companies logged a collective total of over 1 billion hours of offshore project work, underscoring the massive volume of operations that remain labor-intensive. The persistent need for human-in-the-loop oversight, driven by the current inability to transmit data or sustain power over long distances, directly inhibits the widespread adoption of autonomous underwater vehicles in complex environments.

Market Trends

The integration of Artificial Intelligence is revolutionizing the market by enabling vehicles to operate autonomously in complex, communication-denied environments without continuous human intervention. Advanced algorithms allow UUVs to perform decision-making and real-time data processing at the edge, significantly reducing the reliance on support vessels and acoustic telemetry. This technological advancement is driving substantial investments in manufacturing to scale the production of AI-enabled platforms. For example, Anduril Industries announced in January 2025 plans to build a new $1 billion factory in Ohio dedicated to mass-producing autonomous defense systems, including maritime drones equipped with its proprietary Lattice AI software.

Simultaneously, there is a notable shift toward Robotics-as-a-Service (RaaS) business models, allowing operators to procure specific outcomes, such as hull cleaning or data collection, rather than investing capital in depreciating hardware. This model creates recurring revenue streams for technology providers and lowers the barrier to entry for commercial clients, encouraging the deployment of resident systems for continuous maintenance. This strategic pivot is yielding financial success; Greensea IQ reported in January 2025 a record-breaking 57% year-over-year revenue increase, a surge attributed primarily to the rapid adoption of its Robot-as-a-Service offerings, such as the EverClean hull grooming solution.

Key Market Players

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Kongsberg Gruppen ASA

Saab AB

Lockheed Martin Corporation

Teledyne Technologies Incorporated

Oceaneering International Inc

Fugro N.V.

General Dynamics Mission Systems Inc

BAE Systems plc

Atlas Elektronik GmbH

L3Harris Technologies Inc

Report Scope

In this report, the Global Unmanned Underwater Vehicles Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Unmanned Underwater Vehicles Market, By Type

Shallow AUVs (up to 100 m)

Medium AUVs (up to 1,000m)

Large AUVs (more than 1,000m)

Unmanned Underwater Vehicles Market, By Shape

Torpedo

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- Laminar Flow Body
- Streamlined Rectangular Style
- Multi-hull Vehicle

Unmanned Underwater Vehicles Market, By Application

- Collision Avoidance
- Communication
- Navigation
- Propulsion
- Imaging

Unmanned Underwater Vehicles Market, By Region

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - France
  - United Kingdom
  - Italy
  - Germany
  - Spain

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- Asia Pacific
  - China
  - India
  - Japan
  - Australia
  - South Korea
- South America
  - Brazil
  - Argentina
  - Colombia
- Middle East & Africa
  - South Africa
  - Saudi Arabia
  - UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Unmanned Underwater Vehicles Market.

Available Customizations:

Global Unmanned Underwater Vehicles Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The

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following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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