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Unmanned Sea System Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Unmanned Underwater Vehicles (UUV), Unmanned Surface Vehicles (USV)), By Capability Type (Remotely Operated Vehicles, Autonomous Vehicle), By Region & Competition, 2021-2031F

https://marketpublishers.com/r/U9FE069BB335EN.html
Date: May 2026
Pages: 177
Price: US$ 4,500.00 (Single User License)
ID: U9FE069BB335EN

Abstracts

The Global Unmanned Sea System Market is projected to expand from USD 7.05 Billion in 2025 to USD 9.84 Billion by 2031, reflecting a Compound Annual Growth Rate (CAGR) of 5.71%. This market is characterized by the advancement and utilization of Unmanned Surface Vessels (USVs) and Unmanned Underwater Vessels (UUVs) designed to execute varied maritime operations without onboard personnel. Growth is primarily propelled by the increasing need for maritime domain awareness and the desire within the defense and offshore energy sectors to lower operational costs associated with hazardous, long-duration missions. Highlighting the significant financial commitment driving this sector, the Association for Uncrewed Vehicle Systems International noted that the U.S. Department of Defense requested approximately $2 billion in 2025 specifically for uncrewed maritime platforms.

However, a significant barrier to broader market expansion is the absence of a globally harmonized regulatory framework for autonomous navigation. The current ambiguity regarding collision regulations and liability standards creates substantial legal and operational uncertainty, which impedes the seamless integration of these systems into commercial shipping lanes and complex naval environments. This lack of clear governance continues to delay the full realization of the market's potential.

Market Driver

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A primary engine for market growth is the surge in government spending on defense capabilities and naval modernization. Navies around the world are progressively adopting Unmanned Surface Vessels (USVs) and Unmanned Underwater Vessels (UUVs) to strengthen asymmetric warfare tactics and perform high-risk Intelligence, Surveillance, and Reconnaissance (ISR) tasks without endangering personnel. This strategic evolution is underpinned by significant funding dedicated to the rapid deployment of autonomous systems against evolving threats. For example, DefenseScoop reported in May 2024 that the U.S. Pentagon obtained $500 million for the first phase of the 'Replicator' initiative, aiming to accelerate the delivery of attritable maritime drones and autonomous systems within the fiscal year.

Concurrently, the expansion of renewable energy infrastructure and offshore oil and gas operations is stimulating the widespread adoption of unmanned maritime technologies. Commercial entities are leveraging autonomous systems to conduct cost-efficient seabed mapping, wind farm maintenance, and pipeline inspections, which offer reduced carbon emissions compared to conventional manned vessels. This demand is reflected in the financial results of major industry stakeholders; for instance, Fugro reported in August 2024 that its Marine business segment revenue rose by 10.9%, driven by offshore wind fleet expansion. Similarly, Kraken Robotics reported a 67% year-over-year revenue increase in the second quarter of 2024, highlighting the escalating need for advanced subsea sensor and power solutions.

Market Challenge

A critical barrier to the Global Unmanned Sea System Market is the lack of a unified international regulatory framework. Existing maritime laws are predicated on human decision-making, resulting in a legal void concerning collision avoidance and liability for autonomous vessels. This uncertainty complicates risk assessment for marine insurers, thereby limiting the coverage necessary for commercial operations. Consequently, operators are compelled to confine unmanned surface and underwater vessels to restricted testing areas rather than deploying them in complex, high-traffic international shipping routes where they would offer the most operational value.

This regulatory fragmentation creates a bottleneck that hinders the industry from realizing its full economic capabilities. In the absence of standardized, clear rules, the progression from prototype testing to full-scale integration into commercial fleets is effectively halted. The economic impact of these restrictions is significant; according to Maritime UK, the maritime engineering, science, and technology sector contributed ?35

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billion to the UK economy in 2024, a figure that emphasizes the substantial financial scale of the industry currently constrained by these legislative and operational limitations.

Market Trends

The rise of Extra-Large Unmanned Underwater Vehicles (XLUUVs) marks a significant evolution in maritime strategy, shifting focus from small tactical drones to strategic assets designed for long-range, autonomous operations. These large-displacement vessels are engineered to function independently for weeks, carrying varied payloads for undersea warfare, surveillance, and intelligence without risking human crews. This movement toward high-capability autonomy is illustrated by major defense contracts; as reported by Naval News in September 2025, the Australian Government solidified this priority by signing an A$1.7 billion contract with Anduril Australia for the Ghost Shark XLUUV fleet, signaling the rapid transition of these systems from prototypes to official programs.

Simultaneously, the proliferation of Armed Unmanned Surface Vessels for combat is redefining naval force structures by emphasizing low-cost, attritable lethality over expensive manned ships. Navies are increasingly pursuing modular, mass-producible surface drones armed with kinetic capabilities to extend fleet reach and overwhelm adversaries. This operational shift is driving faster procurement timelines for systems compatible with lethal payloads. According to Breaking Defense in July 2025, the U.S. Navy advanced this effort by issuing a solicitation for the "Modular Attack Surface Craft" (MASC), requiring a design capable of carrying containerized weapons that could be deployed within just 18 months of the contract award.

Key Market Players

Unique Group

BAE Systems plc

General Dynamics Mission Systems

Lockheed Martin Corporation

Kongsberg Gruppen ASA

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L3Harris Technologies Inc.

ATLAS ELEKTRONIK GmbH

The Boeing Company

Boston Engineering Corporation

Elbit Systems Ltd.

Report Scope

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

Unmanned Sea System Market, By Type

Unmanned Underwater Vehicles (UUV)

Unmanned Surface Vehicles (USV)

Unmanned Sea System Market, By Capability Type

Remotely Operated Vehicles

Autonomous Vehicle

Unmanned Sea System Market, By Region

North America

United States

Canada

Mexico

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

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Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Unmanned Sea System Market.

Available Customizations:

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