

# GLOBAL UNMANNED UNDERWATER VEHICLES MARKET

By Product [ROV (Remotely Operated Vehicles)  
and AUV (Autonomous Underwater Vehicles)],  
By Application [Defense, Oil & Gas, Scientific  
Research]

– FORECAST PERIOD (2014-2019)



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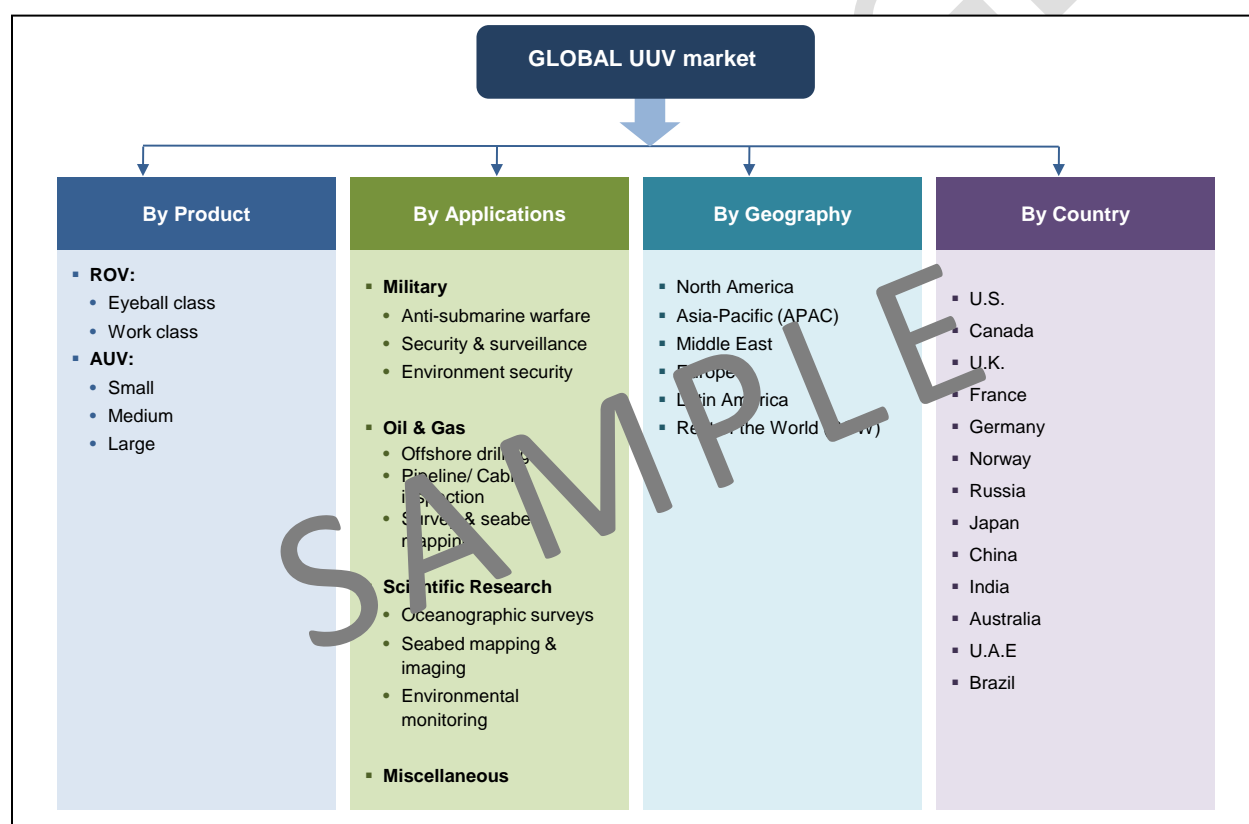
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# 1 MARKET OVERVIEW

## 1.1 SEGMENTATION

FIGURE 1

### MARKET SEGMENTATION



Source: MarketsandMarkets Analysis

The UUV market can be categorized by product as ROV and AUV market. The ROV and AUV have their applications in three major end-markets: military and port security, oil and gas exploration, and scientific research. This report will discuss various existing market opportunities in these sectors over the forecast period, 2014-2020.

## 2 PRODUCT ANALYSIS

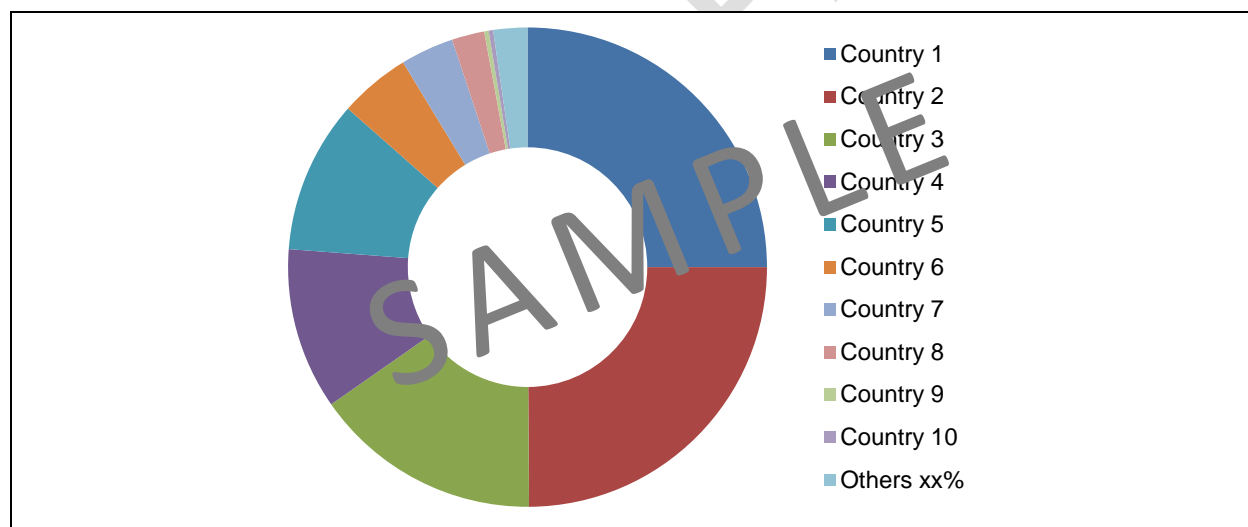
### 2.1 GLOBAL ROV AND AUV PRODUCTION

#### 2.1.1 GLOBAL ROV PRODUCTION, BY TYPE&COUNTRY

##### 2.1.1.1 Global trenching/burial class ROV production, by country

FIGURE 2

TRENCHING/BURIAL CLASS ROV PRODUCTION, BY COUNTRY, 2014-2019 (%)



Source: MarketsandMarkets Analysis

## 3 REGIONAL ANALYSIS

### 3.1 ROW: ROV AND AUV MARKET

The Rest of the World is expected to contribute XX to the ROV market and XX to the AUV market. The ROV and AUV market will be dominated by oil and gas application. Angola and Nigeria are identified as the emerging markets in the ROW; the growth of this segment is also expected to fuel oil and gas exploration in the western coast of Africa.

Huge demand for offshore ultra-deepwater drilling rigs is expected to drive the UUV market in the rest of the world. There is expected to be a sharp increase in drilling activities in Angola and Nigeria over the next few years. Demand for deep-sea exploration and other oilrig activities are also expected to boost the ROV and AUV market in the African region.

**TABLE 1**

**ROW: ROV MARKET SIZE, 2014-2019 (\$MILLION)**

Particular	2014	2015	2016	2017	2018	2019	CAGR%
Revenue	XX	XX	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis

### 3.1.1 ROW: ROV SEGMENTS: OIL AND GAS, SCIENTIFIC RESEARCH AND DEFENSE

TABLE 2

#### ROW: ROV MARKET SIZE, BY APPLICATION, 2014-2019 (\$MILLION)

Application	2014	2015	2016	2017	2018	2019	CAGR%
Oil and Gas	XX	XX	XX	XX	XX	XX	XX
Scientific Research	XX	XX	XX	XX	XX	XX	XX
Defense	XX	XX	XX	XX	XX	XX	XX
Miscellaneous	XX	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis

Defense sector hold the major market share in this region. The defense market is expected to grow from XX million in 2014 to XX million by 2019 with a CAGR of XX. ROV are expected to be greatly used in oil and gas applications such as mine hunting, drilling, and pipeline inspection. The ROV will also majorly be used in maintenance and environmental control tasks. Defense sector will see maximum growth for ROV market in ROW. The countries 'expenditure towards security and surveillance activities will boost the ROV market in ROW.

TABLE 3

#### ROW: AUV MARKET SIZE, 2014-2019 (\$MILLION)

Year	2014	2015	2016	2017	2018	2019	CAGR%
Revenue	XX	XX	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis

### 3.1.2 ROW: AUV SEGMENTS: OIL AND GAS, SCIENTIFIC RESEARCH AND DEFENSE

TABLE 4

#### ROW: AUV MARKET SIZE, BY APPLICATION, 2014-2019 (\$MILLION)

Application	2014	2015	2016	2017	2018	2019	CAGR%
Oil and Gas	XX	XX	XX	XX	XX	XX	XX
Scientific Research	XX	XX	XX	XX	XX	XX	XX
Defense	XX	XX	XX	XX	XX	XX	XX
Miscellaneous	XX	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis

The ROW AUV market is driven by oil and gas and expected to grow from XX million in 2014 to XX million by 2019 for oil and gas application. The countries in the ROW will continue to spend on defense to register a CAGR of XX till 2019. The western coast of Africa is highly explored in recent times. The countries such as Angola and Nigeria are investing into offshore drilling activities along the west coast of Africa, which would act as a major driver of the AUV market. Seabed mapping and research activities are expected to further boost the use of AUV in the ROW.

**\*\*\* Note: The ROW region comprises the study for Africa**

## 4 COUNTRY ANALYSIS

### 4.1 INDIA

India is now a growing market for ROV and AUV. The L&T launched its first AUV in-house named 'Adamyra' for the Indian Navy as a technological development initiative. This AUV is a customizable AUV and can suit all requirements. The launch and recovery of this AUV is from the torpedo of the submarine, which is a pioneering feature in itself. Adamyra is a spacious AUV designed for more payloads, is in the advanced stage of assembly, and is expected to launch commercially in August or September 2014. In India, there are many UUV projects developed in recent years. The AUV-150 of IIT Kharagpur was built for coastal security and mine counter-measures, coastal monitoring and reconnaissance. There are activities such as aquatic life study, seabed mapping, and cable and pipeline surveys carried out by the Indian government. The Matsya 2.0 series, developed by IIT Bombay in 2013, is capable of localization and navigation for the predefined tasks. The Indian Navy wants ROV and AUV that can carry variable payloads such as high definition sonar and surveillance cameras for deep-sea activities. The Indian Ocean exploration activities have now increased interest of Chinese and Japanese governments, which will serve as a driver for the ROV and AUV market in the APAC region.

#### 4.1.1 INDIA: ROV SEGMENTS FORECAST

**TABLE 5**

#### INDIA: ROV MARKET SIZE, 2014-2019 (\$MILLION)

Particular	2014	2015	2016	2017	2018	2019	CAGR%
Revenue	XX	XX	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis



TABLE 6

**INDIA: ROV MARKET SIZE, BY APPLICATION,  
2014-2019 (\$MILLION)**

Application	2014	2015	2016	2017	2018	2019	CAGR%
Oil and Gas	XX	XX	XX	XX	XX	XX	XX
Scientific Research	XX	XX	XX	XX	XX	XX	XX
Defense	XX	XX	XX	XX	XX	XX	XX
Miscellaneous	XX	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis

Oil and gas segment and scientific research segment in India is expected to grow exponentially over the next 5 years. Both these segments are estimated to grow at a CAGR of XX over the next 5 years. The developments made in the ROV and AUV over the last few years and Indian Ocean exploration is expected to drive the ROV market in India. Oilrigs and wind turbine construction during the forecast period has a significant impact on the ROV sector

**4.1.2 INDIA: AUV SEGMENTS FORECAST**

TABLE 7

**INDIA: AUV MARKET SIZE, 2014-2019 (\$MILLION)**

Particular	2014	2015	2016	2017	2018	2019	CAGR%
Revenue	XX	XX	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis

TABLE 8

**INDIA: AUV MARKET SIZE, BY APPLICATION,  
2014-2019 (\$MILLION)**

Application	2014	2015	2016	2017	2018	2019	CAGR%
Oil and Gas	XX	XX	XX	XX	XX	XX	XX
Scientific Research	XX	XX	XX	XX	XX	XX	XX
Defense	XX	XX	XX	XX	XX	XX	XX
Miscellaneous	XX	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis

It is expected that Indian Ocean seabed mapping activities will drive AUV revenue in the next 5 years. AUV are mainly used for oil and gas applications and oceanographic studies. The oil and gas segment is expected to grow at a CAGR of XX to reach XX million by 2019; the scientific research segment is expected to grow at a CAGR of XX while the military market is estimated to grow at a rate of XX over the next 5 years. L&T is working on AUV for the Indian Navy to carry out activities in the Indian Ocean.

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