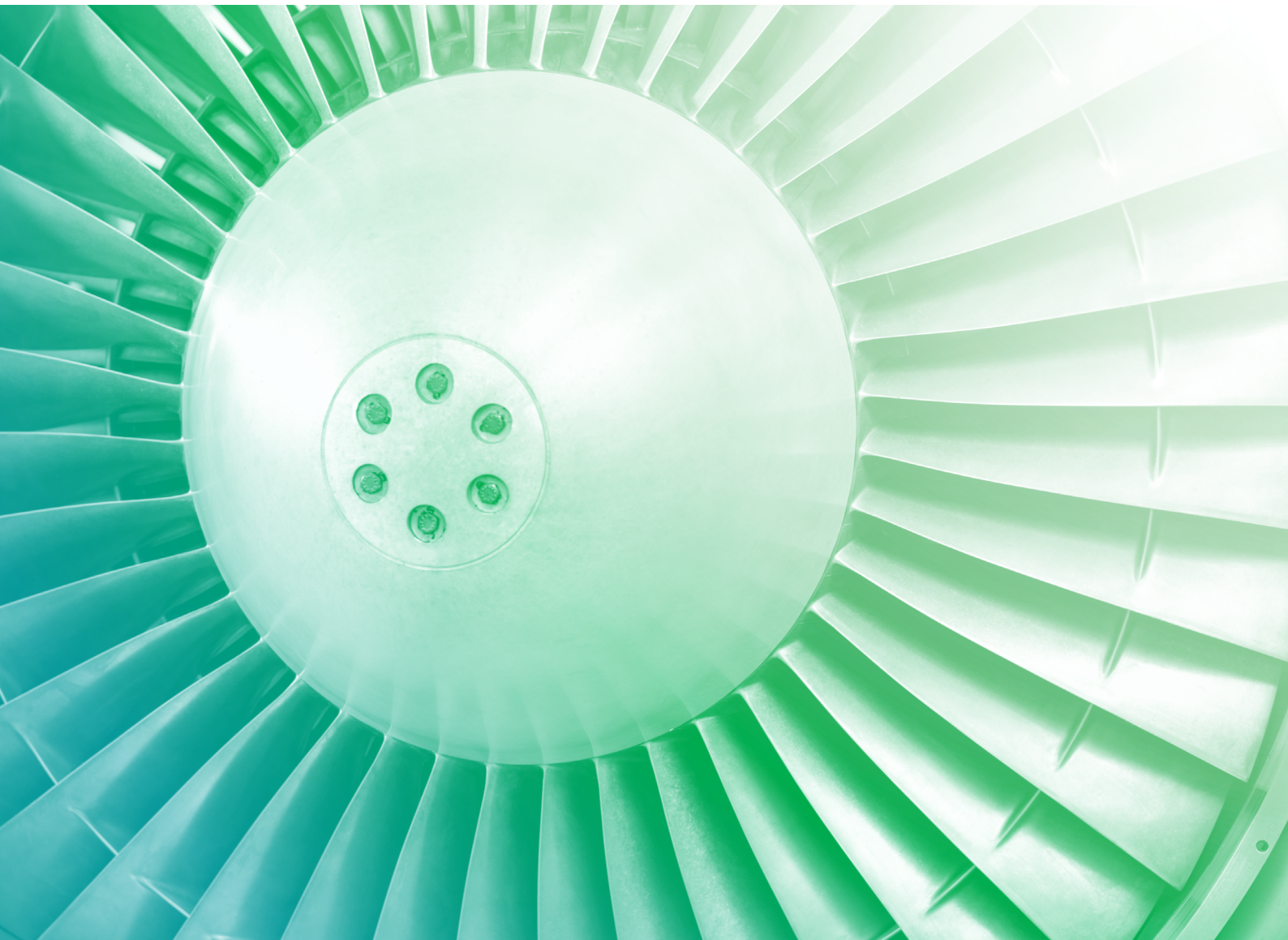




Jane's  
By IHS Markit

# Militaries Ramping Up Use of Unmanned Ground, Sea and Air Vehicles

More than 63,000 new UAVs and over 30,000 new UGVs  
will be operational over next 10 years



**M**ilitaries are becoming increasingly reliant on unmanned ground, sea and aerial vehicles to carry out dull, dirty and dangerous missions. Unmanned military ground, sea and air vehicle technology is evolving rapidly and Jane's analysts are predicting strong growth across all three sectors over the next five to ten years.

### **Unmanned Aerial Vehicle (UAV)**

UAV sales are expected to exceed USD82 billion globally over the next 10 years, with growing global tension and the foreseen increasing role of UAVs in operations keeping demand high.

Jane's forecasts sales of 63,000 new UAVs in the next decade, with increased focus on cost-effective and flexible systems, as well as smaller and more efficient sensors and communication systems. Additionally, Jane's analysts are seeing increases in mission endurance times. The Zephyr 8/S is a pseudo-satellite UAV and can operate autonomously for months due to electric power from its battery and solar panels.

### **Unmanned Ground Vehicles (UGV)**

UGVs demonstrated their capabilities in Iraq and Afghanistan and were important in combating the threat of improvised explosive devices (IEDs). However, many UGVs were delivered a decade or more ago and have been superseded by new technology, such as enhanced sensors and systems. As a result many will need updating within the next 5 to 10 years.

Between 2016 and 2025, Jane's forecasts a delivery potential of 30,000 UGVs mostly to replace old inventory. The forecast for the sector projects a growth from around USD200 million in sales in 2016, to approximately USD800 million by 2025. In the 2016-25 timeframe, approximately USD4.9 billion will be spent on UGVs globally.

Growing applications for new generation systems, such as bomb squads and emergency service sectors, will also keep demand growing in the 5- to 10-year outlook.

### **Unmanned Sea Vehicles (USV)**

USVs have been used for decades for mine hunting and disposal, but are still at a relatively early stage of development. They are being used in a variety of ways including anti-submarine warfare, counter terrorism, anti-smuggling, harbour surveillance and increasingly in littoral waters.

Jane's analysts forecast that USV sales will grow from just over USD400 million in 2016 to more than USD900 million by 2025. Jane's forecast total USV sales between 2016 and 2025 to hit USD6.5 billion. Many suppliers are offering products across military and civil markets with more modular system designs to integrate surface and underwater system solutions.

### **Systems Interoperability**

Integration is at the heart of future missions and the future will involve complex teaming of manned, unmanned and optionally manned assets with much higher system autonomy.

Jane's analysts believe that unmanned systems provide operational differentiation and those forces that do not invest in this capability will be at a significant disadvantage. With technology advancing at such a pace, a myriad of applications will unfold limited only by the imagination of the designer.



## UAVs

Unmanned Aerial Vehicles

Over the next 10 years,  
UAV sales will exceed

**\$82 billion**

globally

Sales of

**63,000** new UAVs

in the next decade



## UGVs

Unmanned Ground Vehicles

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## USVs

Unmanned Sea Vehicles

USVs sales will grow from just  
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IHS Jane's forecast total  
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## About Jane's

With a legacy of over 100 years, Jane's is one of the world's most trusted providers of open-source intelligence and deep market insights for aerospace, defence and security (AD&S). We combine superior information, analytics and expertise to forge solutions that help corporations grow market share and security and defence communities operate in an increasingly volatile environment. Decision makers rely on Jane's to track geopolitical shifts, carry out capability assessments, plan for supply-chain disruptions, ensure regulatory compliance, navigate emerging markets, and control costs.

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