

# The Emerging UUV and UGV Markets 2009-2019

## 3. Unmanned Underwater Vehicles (UUV)

### 3.1 Unmanned Underwater Vehicles (UUV) Market Forecast

#### 3.1.1 Global Unmanned Underwater Vehicles (UUV) Market

Governments with significant spending on UUVs and AUVs include the US, Russia, UK, Australia, New Zealand, Finland, Denmark, France, Germany and Norway. There are also some smaller amounts of AUV spending in South Korea, China, Japan and Taiwan. There is a clear link between countries that have long coastlines and UUV development programmes and government spending on UUVs.

Autonomous underwater vehicles (AUVs) are increasingly being integrated into routine missions due to the introduction of miniaturised sensors and better communication solutions. Another growth driver is the demand for lighter, more-portable AUVs that can be launched from smaller vessels, such as rigid hull inflatable boats (RHIB).

Visiongain forecasts that global government spending on UUVs will grow strongly from █████ in 2009 to █████ in 2019, with a CAGR of █████% over the period 2009-2019. See Table 3.1 and Figure 3.1. Global government UUV spending includes research, development, testing and evaluation (RDT&E) and procurement.

**Table 3.1 Global Government Spending on Unmanned Underwater Vehicles 2009-2019**

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2009-2019
<b>Sales (\$m)</b>		█████	█████	█████	█████	█████	█████	█████	█████	█████	█████	█████	█████
AGR (%)	-	█████	█████	█████	█████	█████	█████	█████	█████	█████	█████	█████	
CAGR (%)													█████

Source : Visiongain 2009

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## 7. Leading UMV & UGV Manufacturers

### 7.1 AAI Corporation

**Headquarters:** Maryland, US

**Unmanned vehicle systems:** UAV, UGV, USV

AAI Corporation is a global enterprise providing engineering services for the aerospace and defence industries. Businesses units include tactical unmanned aircraft systems for the US Army, US Marine Corps, and other allied armed forces, automated aircraft test and maintenance equipment, armament systems, aviation ground support equipment and logistics, engineering. AAI Corporation also provides training and simulation systems and supply chain management services. AAI Corporation is perhaps best known for the 25 years of experience in the unmanned aerial vehicles (UAV) market. Their product range includes the RQ-7B Shadow tactical UAV. AAI's Aerosonde small UAV is manufactured by their Australian subsidiary, Aerosonde Pty Ltd. AAI Corporation is an indirectly wholly owned subsidiary of Textron Inc.

AAI Corporation's recent acquisitions include the UK electronic warfare systems company ESL Defence Limited, Australian unmanned aircraft systems developer Aerosonde Pty Ltd and functional test systems manufacturer Symtx Inc. of Texas, US.

In September 2008, AAI announced a partnership with Israel company Aeronautics Ltd., the designer of the Orbiter miniature unmanned aircraft, to market the product.

AAI Corporation is also a subcontractor with Honeywell's Micro Air Vehicle. On this programme, AAI designed and now fabricates the centre body and pod sections of the ducted fan air vehicle.

AAI Corporation have developed an interoperability network of common ground control systems for their UAV system. This system is now the US Army's designated One System Ground Control Station, One System Portable Ground Control Station, and One System Remote Video Terminal. However, AAI Corporation is now leveraging its technology and expertise in UAV systems to

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enter the small but rapidly growing unmanned surface vehicles (USV) market. In July 2008, AAI Corporation successfully demonstrated the control of an unmanned surface vehicle (USV) off the coast of Melbourne, using the same Ground Control Station (GCS) architecture in a man-portable configuration called an Expeditionary GCS. The GCS architecture has demonstrated an integrated command and control capability for all compliant UAS, UGV and USV systems too.

## 7.2 AB Precision Ltd

**Headquarters:** Dorset, UK

**Unmanned vehicle systems:** UGV, ROV

AB Precision Ltd. (ABP) is an engineering company that designs and manufactures remotely operated vehicles (ROV) for Explosive Ordnance Disposal (EOD) and Improvised Explosive Device Disposal (IEDD) applications.

ABP is a prime contractor to the UK's Ministry of Defence (MoD) and is widely recognized for its innovative EOD products. ABP supply the military, law enforcement and security agencies around the world with bomb disposal equipment for applications such as military operations and homeland security.

## 7.3 Allen Vanguard Corporation

**Headquarters:** Ottawa, Canada

**Unmanned vehicle systems:** UGV, ROV

Allen Vanguard is a global company specialising in equipment, services and training for dealing with hazardous threats such as Improvised Explosive Devices (IEDs), Radio Controlled IEDs (RCIEDs), Chemical, Biological, Radiological, Nuclear (CBRN) threats, Allen Vanguard products and services are used by military and police forces in over 120 countries worldwide.

Allen Vanguard produces Electronic Countermeasures (ECM) platforms for the prevention of detonation of RCIEDs.

The Defender ROV is a large bomb disposal robot constructed from titanium with heavy lifting capability. The Defender can be