

Marine Surveillance Drones

ANMD-MRS22-212 · Marine AI Solutions

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Marine surveillance drones bring autonomous, persistent maritime-domain awareness to coast guards, navies and offshore operators, turning sparse patrol coverage into continuous, sensor-rich monitoring. Purpose-built platforms — aerial UAVs, unmanned surface vessels and tethered systems carrying EO/IR, radar and AIS / SIGINT payloads — are engineered so that coastlines, fisheries and offshore assets are watched at lower cost and lower risk. This decision-grade study sizes the global market three ways — value, deployed units and area surveilled — across segmentation, seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

The sustainability case is the report's backbone. Beyond security, marine surveillance drones deliver measurable faster pollution and IUU detection, reduced crewed-asset risk, and protected marine ecosystems, while lower-emission uncrewed platforms strengthen the environmental story. The analysis applies double materiality, maps outcomes to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, and Dual-use concerns, data-privacy, e-waste in payloads and surveillance-governance are treated as material risks — with greenwashing and SDG-washing screens applied throughout.

Mapped Sustainable Development Goals:

SDG 14 Life Below Water	SDG 16 Peace & Strong Institutions	SDG 13 Climate Action
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Measurable sustainability outcomes assessed:

- Persistent ocean and border monitoring
- Reduced emissions versus crewed patrol vessels
- Enhanced marine-protection and IUU-fishing detection
- Data sovereignty and dual-use governance as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	3 SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America and Europe lead defence and maritime-domain awareness; Asia Pacific scales coastal surveillance; other regions on their own merits.

MARKET OVERVIEW

From crewed patrols to persistent, autonomous maritime surveillance.

Marine surveillance is moving from episodic patrols to persistent, autonomous coverage. Demand is driven by the convergence of maritime-security pressure, IUU-fishing enforcement and offshore-asset protection, supported by maturing defence and coast-guard procurement across Europe, North America and Asia Pacific. The market is read three ways — value, deployed units and area surveilled — and forecast under four scenarios (conservative, base, accelerated and disruption), each region reported separately.

- **Europe leads early commercialisation** — anchored by the United Kingdom, Norway, France and Austria, where coast-guard programmes, fisheries enforcement and EO/IR-USV designs are most advanced.
- **Asia Pacific is the scale engine** — with China, Japan, South Korea, Singapore and Australia combining maritime-security drivers with large coastline and EEZ monitoring needs.
- **North America is accelerating** — supported by US Coast Guard and Navy programmes, defence-autonomy investment and offshore-energy surveillance demand.
- **Platform and sensor segment the value** — across aerial UAV, unmanned surface vessel and tethered platforms, and across EO/IR, radar, AIS / SIGINT and multi-sensor payloads, each with distinct economics.

REGIONAL OUTLOOK

Across seven reporting regions, the report separates commercialisation and supply leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Europe	Commercial leader	Norway, UK, Finland, Netherlands — class guidance, autonomy trials, smart-port & decarbonisation drivers
Asia Pacific	Scale engine	China, Japan, South Korea, Singapore, Australia — shipbuilding base, port efficiency, fleet scale
North America	Accelerating	United States, Canada — coast-guard & defence programmes, port modernisation, maritime-AI ventures
Latin America	Emerging	Brazil, Chile — ports, fisheries and offshore-energy adoption
Africa	Frontier	South Africa, Kenya, Morocco — port development, fisheries protection, blended finance
Middle East	Frontier	Saudi Arabia, UAE, Israel — port investment, maritime security, sovereign capital

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • Maritime-security & IUU-fishing enforcement • Offshore-asset & critical-infrastructure protection • Defence & coast-guard procurement growth • Endurance & cost-per-hour advantage vs crewed • EO/IR, radar & AI-detection payload gains 	<ul style="list-style-type: none"> • Airspace & maritime-operating regulation • Datalink, comms & beyond-line-of-sight limits • Payload SWaP & endurance trade-offs • Cyber-security & data-sovereignty concerns • Export-control & procurement-cycle barriers

SEGMENTATION SNAPSHOT

By Platform	Aerial UAV · unmanned surface vessel · tethered
By Sensor	EO/IR · radar · AIS / SIGINT · multi-sensor
By Application	Coastal surveillance · fisheries / IUU monitoring · pollution detection
By End User	Coast guards · navies · fisheries agencies · offshore operators
By Business Model	Hardware sale · lease · surveillance-as-a-service · outcome-based
By Scale	Pilot · fleet rollout · networked operations

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Marine Surveillance Drones
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

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- › Chapter 12. North America Market Intelligence
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Part IV — Technology, Innovation and Category-Specific Intelligence

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- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

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Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

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- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans maritime-autonomy specialists, established defence-systems manufacturers, and sensor-payload innovators.

Representative players profiled in the full report:

Saildrone, Inc. · Ocean Infinity Limited · Teledyne FLIR LLC (Teledyne Technologies Incorporated) · Elbit Systems Ltd. · Schiebel Aircraft GmbH · and 20+ further profiled players across uncrewed-surface-vehicle and maritime-surveillance innovators.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a clear, decision-ready investment verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global marine surveillance drones market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How does autonomous endurance change surveillance value versus crewed assets?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the category align with the SDGs, circular-economy and resource-security and disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- **Triangulated sizing** — every market read three ways (value, deployed units and area surveilled) so value-led and volume-led views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, decision-ready investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and defence / PE funds, navies and coast guards, maritime-security agencies, OEMs and integrators, regulators and lenders, and strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.