



SURFACE WARSHIPS & OFFSHORE PATROL VESSELS



OPV MARKET REPORT 2023-2028



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OVERALL TRENDS

The market for Offshore Patrol Vessels (OPVs) in the selected countries is expected to cumulatively value US\$14.6 billion during 2023-2028. The U.S. is the largest contributor to this spending with almost US\$5.4 billion or 37% of the total market, followed by Australia (US\$3.9 billion), Italy (US\$1.2 billion), Japan (US\$1.1 billion), and France (US\$0.9 billion). Procurement of 25 Offshore Patrol Cutters (OPCs) by the U.S. Coast Guard is the largest procurement program in this category with a value of US\$10.3 billion.

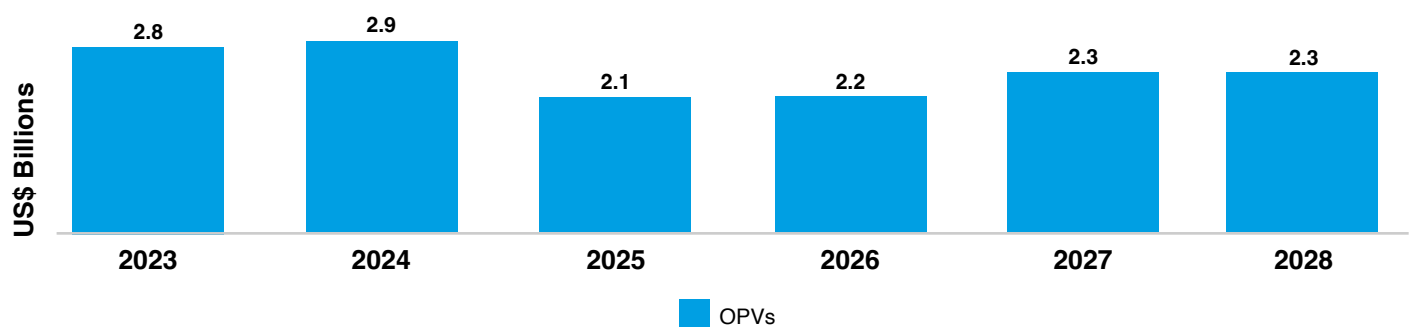
Interestingly, even though OPVs have historically been used as multi-mission platforms carrying out tasks such as maritime security, border patrol, and disaster relief, manufacturers are now increasingly adopting modular designs to further enhance their operational capabilities. Good examples include the design and construction of Next-Generation modular OPVs by Japan and India that include deck space for effective integration of modular payloads such as gun systems and radars, and UAV hangars. This enables the vessels to not only become more effective for the desired mission, but also more easily upgradable to advanced fits. In the selected countries, companies such as Austal, Birdon America, Eastern Shipbuilding Group, Fincantieri, and Lürssen Australia are dominant, accounting for 64% of contracts awarded.

Programs which are currently in concept or RFP stage, thereby presenting opportunities for suppliers include the U.S. Coast Guard's procurement of commercially available polar icebreakers, Portugal's Plataforma Naval Multifuncional (Multifunctional Naval Platform), Italy's High-Speed Multi-purpose Patrol Vessels, and Nigeria's Long and Medium endurance OPVs.

OPVs Markets, by type for selected countries, 2023-2028, US\$ Billions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs	2.8	2.9	2.1	2.2	2.3	2.3	14.6

Warships and OPVs Markets, Selected Countries, 2023-2028, US\$ Billions - by Type



U.K.

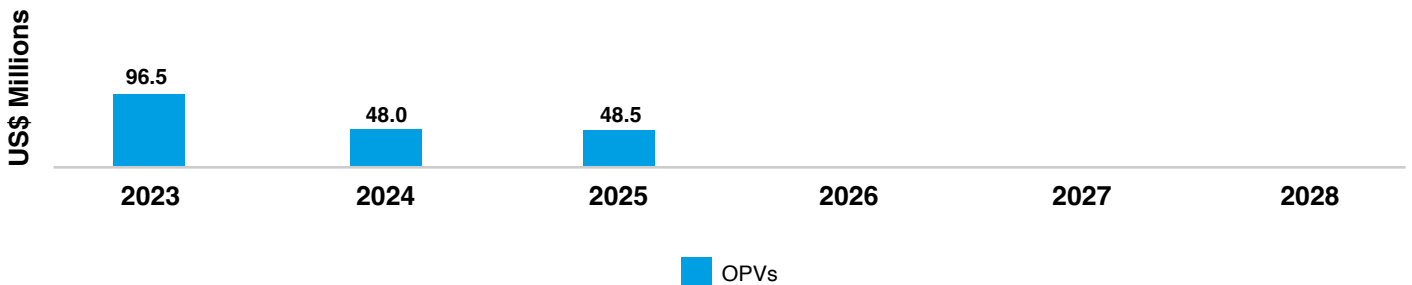


The UK’s market for OPVs is expected to cumulatively value US\$193 million over 2023-2028. It’s key program during this time includes the procurement of two Multi-Role Ocean Surveillance (MROS) ships. While the first one has been bought from Turkish manufacturer Topaz Marine, the supplier of the second ship yet remains undecided. As per the government’s Defence Equipment Plan 2022 to 2032, the Navy was also supposed to procure a multirole support ship but withdrew this plan in July 2022, due to funding issues. The Navy currently has five River class OPVs deployed to the Caribbean, the Mediterranean, the Gulf of Guinea, the South Atlantic and the Indo-Asia Pacific regions.

UK: OPVs Market, 2023-2028, US\$ Millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	96.5	48.0	48.5	-	-	-	193.0

UK: OPVs Market, 2023-2028, US\$ Millions



OPVs – Multi-Role Ocean Surveillance (MROS) Ships

In March 2021, the UK MoD announced its plan to procure two Multi-Role Ocean Surveillance (MROS) ships. The first one was a second-hand commercial OPV purchased from Topaz Energy and Marine, a subsidiary of P&O Maritime Logistics. Called MV Topaz Tangaroa (it will be renamed later), this 6,000-ton vessel has been converted into a specialist ship complete with a helipad, crane, and 1000-square meters working deck, and a ‘moon pool’ to launch submersibles. It is expected to be deployed to carry out underwater operations, such as work on oil rigs, construction, maintenance, inspection, and autonomous submarine operations. The program to acquire the second vessel is still in the concept phase.

FRANCE

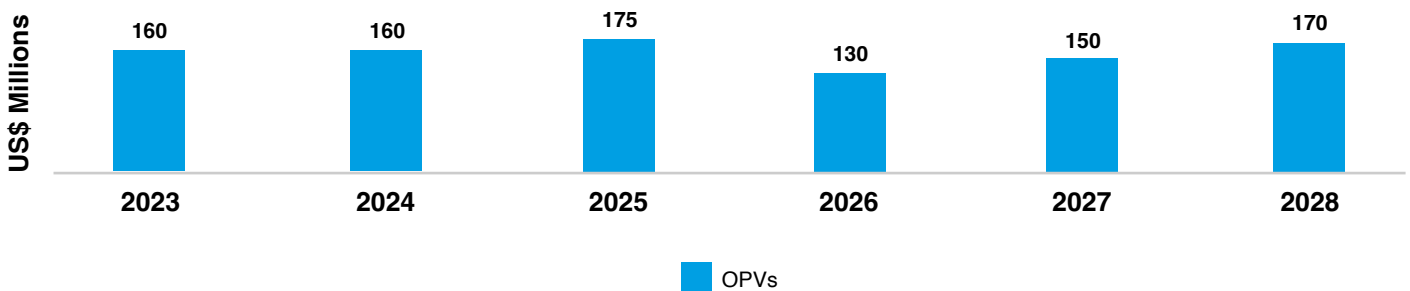


The French market for OPVs is expected to increase from US\$160 million in 2023 to US\$170 million in 2028, at a CAGR of 1.2%. Cumulatively, the market has been estimated at US\$945 million. The key programs driving spending over this period include the procurement of ten Ocean Patrol Vessels (Patrouilleurs Océanique) for US\$1.2 billion and six Overseas Patrol Boats (Patrouilleur d'Outre-Mer) for US\$250 million.

France: OPVs Market, 2023-2028, US\$ Millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	160	160	175	130	150	170	945

France: OPVs Market, 2023-2028, US\$ Millions



OPVs – Ocean Patrol Vessel - Patrouilleurs Océanique

In June 2021, the French Defence Procurement Agency (DGA) contracted local company Naval Group to begin the design and value analysis work for the procurement of 10 ocean patrol vessels for the Navy. This was then followed by another contract in October for the preliminary and detailed design of the vessels. These OPVs are expected to support deterrence and autonomous situation assessment in key areas of interest, and also carry out tasks such as escort, surveillance, and evacuation. They will replace the Navy's ageing fleet of A69 type and Flamant-class OPVs. Each vessel is expected to have a displacement of around 2,000 tons, a length of 90 meters, a top speed of 22 knots and a range of 5,500 nautical miles.

Patrouilleur d'Outre-Mer – POM

The French DGA ordered six new OPVs also known as Patrouilleur d'Outre-Mer for the Navy in January 2020. The contract was awarded to the Socarenam / CNN MCO consortium and also included maintenance support for six years. The vessels which are expected to be based in New Caledonia (Nouméa), la Réunion (Port-des-Galets) and in French Polynesia (Papeete), will replace the Navy's ageing fleet of P400-class patrol boats. Each POM will be 80 meters long, 11.8 meters wide, and will be equipped with a 20mm calibre remote-controlled turret (made by Nexter), and 12.7 mm and 7.62mm machine guns. Deliveries are scheduled between 2022-2025.

ITALY

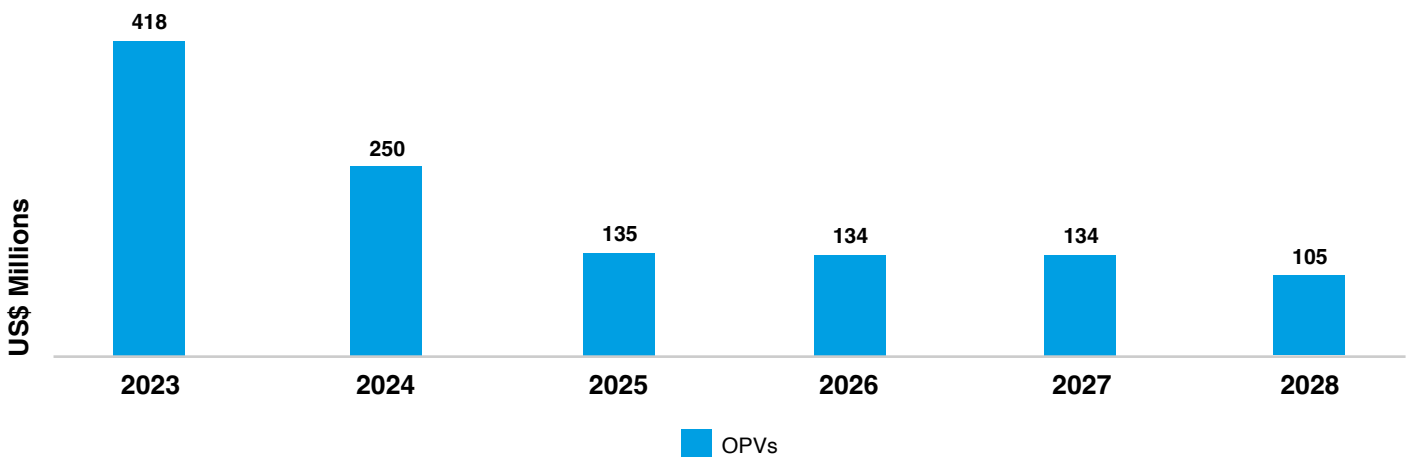


Italy is the largest market for OPVs in Europe with a cumulative spending of US\$1.2 billion over 2023-2028. There are three programs in this category including the procurement of 10 Multipurpose Offshore Patrol Ships (PPA – Pattugliatore Polivalente d'Altura) from Fincantieri (US\$772 million), a Major Hydro-Oceanographic Unit (NIOM) (US\$400 million), and an unspecified number of high-speed multipurpose patrol vessels for US\$3 million.

Italy: OPVs Market, 2023-2028, US\$ millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	418	250	135	134	134	105	1,176

Italy: OPVs Market, 2023-2028, US\$ Millions



OPVs – Multipurpose Offshore Patrol ship (PPA – Pattugliatore Polivalente d'Altura)

The Italian Navy has awarded a contract to Fincantieri to build seven Multipurpose Offshore Patrol ships (PPA – Pattugliatore Polivalente d'Altura) at the Integrated Shipyard of Riva Trigoso and Muggiano, with an option for three more. The vessels are expected carry out various missions including surveillance, sea rescue, civil protection operations, and first line combat. The OPVs will be 143 meters long, have a top speed of 32 knots, can carry 135 crew members, and are powered by a diesel and gas turbine propulsion system. Final deliveries in this program are expected to take place by 2028-2029.

OPVs – Major Hydro-Oceanographic Unit (NIOM)

In December 2022, Fincantieri signed an almost US\$400 million contract with the Naval Armaments Directorate (NAVARM) to build a new hydro-oceanographic ship (NIOM) for the Italian Navy Hydrographic Institute. The contract also includes integrated logistics support and general support services for up to six years with an option to extend for an additional four. Expected to be delivered in 2026, the vessel is expected to be made using sustainable materials and will have a diesel-electric propulsion system and hull shapes to reduce drag. It will be used for seabed mapping, creation of nautical charts, navigation safety and research on climate change. The program also includes the construction of two Coastal Hydro-Oceanographic vessels (NIOC) to replace the Navy's Magnaghi and Ninfe-class vessels.

PORTUGAL

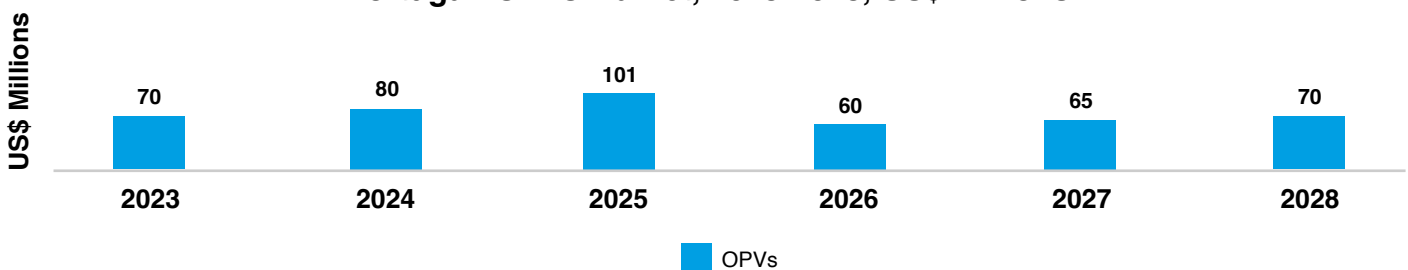


The Portuguese market for OPVs is expected to cumulatively value US\$446 million over the period 2023-2028. The country's key programs in this category include six Viana do Castelo-Class vessels built by British manufacturer Babcock and one Multifunctional Naval Platform (Plataforma Naval Multifuncional), the supplier for which is yet undecided but is expected to be local.

Portugal: OPVs Market, 2023-2028, US\$ Millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	70	80	101	60	65	70	446

Portugal: OPVs Market, 2023-2028, US\$ Millions



OPVs – Viana do Castelo-Class OPVs

In May 2021, the Portuguese government approved the procurement of six Viana do Castelo class OPVs, to augment the Navy's patrol and inspection capabilities. Specifically, the vessels will be deployed on missions such as fisheries inspection, prevention of maritime pollution and tackling criminal activities such as drug trafficking, illegal immigration, and people and weapons trafficking. Four such vessels are already in service with the Navy – the first two were made by domestic company Estaleiros Navais de Viana do Castelo (ENVC) and the other two by West Sea Shipyards, which was created in 2014 after the dissolution of ENVC. Each OPV is 83.1 meters long, has a displacement of 1,600 tons and can carry 67 people (including 35 sailors). Armaments wise, it is equipped with a 30 mm Oto Melara Marlin main gun, two manned 7.62 mm light machine gun mounts, and two launching systems for MK55 Mod 2 mines. The total program value is US\$429 million, US\$345 million of which is expected to be spent over the period 2023-2028.

OPVs – Plataforma Naval Multifuncional (Multifunctional Naval Platform)

In June 2022, the Portuguese Navy announced plans to design and develop an offshore multi-purpose surface ship that would be tasked with the deployment of unmanned surface vessels (USVs), unmanned underwater vehicles (UUVs), and unmanned aerial vehicles (UAVs). It will also carry out other roles such as surveillance, search-and-rescue (SAR), underwater survey, scientific research, and disaster relief. The US\$101 million program is due to be funded from the Recovery and Resilience Plan of the European Union. The platform's rear ramp system and large handling crane will be used to deploy and recover USVs, while the side-mounted davits will deploy and recover USVs and UUVs. Moreover, its island superstructure or main area, will accommodate the bridge, aviation operations centre, and other facilities. The supplier is yet undecided.

U.S.

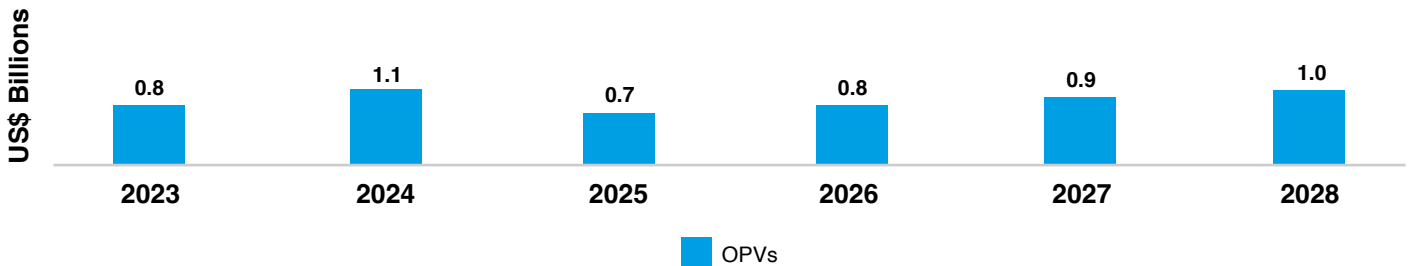


The U.S. is the largest market for OPVs globally with a cumulative value of US\$5.4 billion over 2023-2028. The market is expected to increase from US\$809 million in 2023 to US\$1 billion in 2028, at a CAGR of 4.8%. Interestingly, most of the procurements in this category are being made by the Coast Guard. Key programs include the procurement of 25 Offshore Patrol Cutters (OPCs) made by Eastern Shipbuilding Group and Austal USA (US\$10.3 billion), 11 National Security Cutters (NSCs) made by Huntington Ingalls Industries (US\$7.4 billion), 69 Fast Response Cutters (FRCs) made by Bollinger Shipyards (US\$3.7 billion), and 30 Waterways Commerce Cutters made by Birdon America (US\$1.2 billion).

U.S.: OPVs Market, 2023-2028, US\$ Billions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	0.8	1.1	0.7	0.8	0.9	1.0	5.4

U.S.: OPVs Market, 2023-2028, US\$ Billions



OPVs – National Security Cutters (NSC)

The U.S. Coast Guard started the procurement of 11 National Security Cutters in 2004, to replace its ageing fleet of 12 Hamilton-class high-endurance cutters. Each ship has a procurement cost of around US\$670 million, thereby pegging the program value at US\$7.4 billion. Nine vessels have already been delivered with the 10th expected to enter service in 2023 and the 11th in 2027. Also known as Legend class cutters, the vessels are constructed by Huntington Ingalls Industries' Ingalls Shipbuilding of Pascagoula, MS (HII/Ingalls). Each ship is 418 feet long, has a full load displacement of about 4,500 tons and is larger and technologically more advanced than the Hamilton-class cutters. The U.S. Congress has already paid a large chunk of the cost to HII/Ingalls, with only US\$77.1 million expected to be spent during 2023-2024.

OPVs– Offshore Patrol Cutters (OPC)

According to the U.S. Coast Guard, its OPC program, which consists of the procurement of 25 vessels, is among its highest acquisition priorities. Also known as Heritage-class cutters, they are replacing the service's ageing fleet of 29 medium-endurance cutters. Each OPC is 360 feet long, has a displacement of 4,500 tons, a top speed of 22.5 knots, and an installed BHP of 19,500 hp. The total cost of building and procuring these ships is around US\$10.3 billion or around US\$411 million per ship. The program started in 2012 and eventually two primary contractors, Eastern Shipbuilding Group and Austal USA, were chosen from seven more who had applied during the RFP stage. These included General Dynamics/Bath Iron Works (GD/BIW), Bollinger Shipyards Lockport, Fincantieri Marinette Marine (F/MM), General Dynamics/National Steel and Shipbuilding Company (GD/NASSCO), Huntington Ingalls Industries/Ingalls Shipbuilding (HII/Ingalls), and Philly Shipyard. The first contract was awarded to Eastern Shipbuilding Group in September 2018 and the second to Austal USA in June 2022. The first vessel is expected to be delivered in June 2023, with the last ship entering service in 2040.

U.S.

OPVs – Fast Response Cutters (FRCs)

The U.S. Coast Guard's Fast Response Cutter (FRC) program includes the procurement of 65 vessels to replace its fleet of ageing 49 Island-class patrol boats. The number of vessels was increased from 64 to 65 in August 2022. As of March 2023, 50 FRCs have already been commissioned into service, with the final one expected to be delivered in 2030. The total program value amounts to US\$3.7 billion or US\$57 million per ship. Also called Sentinel-class ships, they are being built by Bollinger Shipyards in Los Angeles. Six of the vessels are currently in use by the Coast Guard in the Persian Gulf as part of a Bahrain-based Coast Guard unit, called Patrol Forces Southwest Asia (PATFORSWA).

OPVs - Polar Security Cutter (PSC)

The Coast Guard's Polar Security Cutter (PSC) program, previously known as the polar icebreaker (PIB) program, is among the service's two highest acquisition priorities. It includes the procurement of three vessels for a total consideration of US\$2.6 billion. The first ship costs US\$1 billion, the second US\$794 million and the third US\$841 million. The contracts for the first and second ships were awarded to Halter Marine in April 2019 and December 2021. The company was sold to Bollinger Shipyards in November 2022 and is now called Bollinger Mississippi Shipbuilding. In December 2022, the Coast Guard stated that the first PSC would be delivered by 2026 or 2027, but this has subsequently become uncertain.



AUSTRALIA

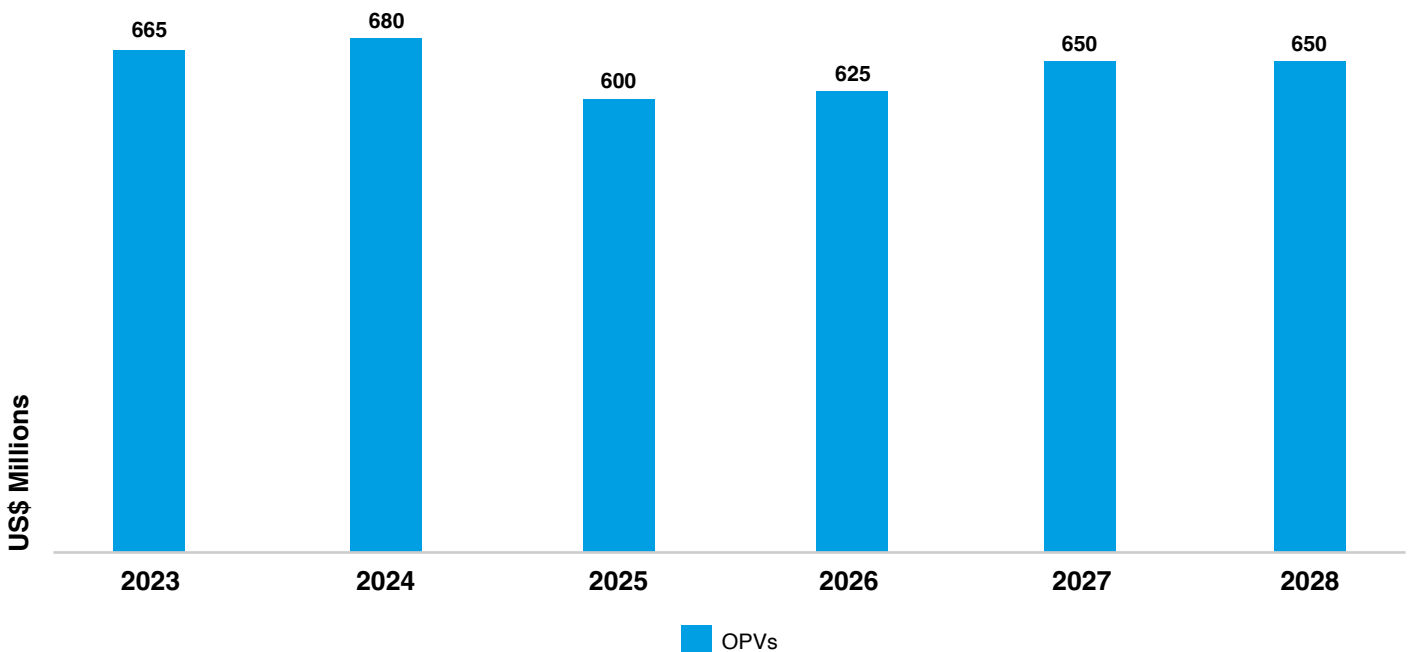


The Australian market for OPVs is estimated to have a cumulative value of US\$3.9 billion over 2023-2028. The market is expected to decline marginally from US\$665 million in 2023 to US\$650 million in 2028. There are only two programs in this category including the procurement of 12 Arafura class vessels under the SEA 1180 Phase 1 program, and eight Evolved Cape class ships under the SEA 1445 Phase 1 program.

Australia: OPVs Market, 2023-2028, US\$ Millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	665	680	600	625	650	650	3,870

Australia: OPVs Market, 2023-2028, US\$ Millions



SEA 1445 Phase 1 - Evolved Cape Class Offshore Patrol Vessels

The contract for the development of six Evolved class OPVs was signed with Australian shipbuilding company Austal Ships in April 2020. The fourth vessel was handed over to the Royal Australian Navy in February 2023, with the remaining two - ADV Cape Woolamai (318) and ADV Cape Pillar (319), expected to be delivered by the end of 2023. In April 2022, Austal Ships was handed another order for the construction of two additional OPVs, with deliveries estimated for 2024. All vessels have an overall length of around 58 meters, overall beam of 10.3 meters and draught of 3 meters. They can achieve a top speed of 25 knots and have a range of around 12,874 kms. The OPVs are also equipped with various types of communication equipment such as very high frequency (VHF), ultra-high frequency (UHF), satellite communication (SATCOM) and sea boat's situational awareness systems. The cost of all eight ships is US\$221 million dollars, US\$160 million of which is expected to be spent over the period 2023-2028.

AUSTRALIA



Warships – SEA 1180 Phase 1 - Arafura Class Offshore Patrol Vessels

In 2015, the Australian MoD launched a competitive evaluation process (CEP) to replace its Armidale Class patrol boats, which translated into a contract in January 2018. The primary contractor Lürssen Australia is building the vessels in partnership with local company Cvmec. The first two ships were built at the Osborne Naval Shipyard in South Australia, while the remaining 10 are expected to be made at Henderson Maritime Precinct in Western Australia. The main role of the 1640-ton warships is to carry out constabulary missions, maritime patrol, and response duties. Each ship is 80 meters long, with a top speed of 20 knots, a range of 7,400 kms and a draught of 4 meters. Out of a total value of US\$4.6 billion, US\$3.7 billion is expected to be spent over the period 2023-2028.



INDIA

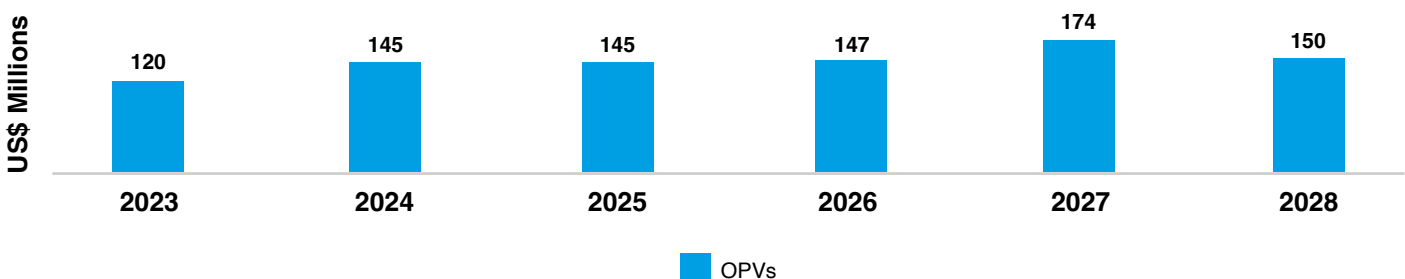


As part of its overall strategy to promote indigenous manufacturing, the Navy's two OPV programs are going to be fulfilled by local manufacturers such as Larsen & Toubro (L&T), with Goa Shipyard Ltd (GSL) and Garden Reach Shipbuilders and Engineers (GRSE). The Indian OPV market is expected to increase from US\$120 million in 2023 to US\$150 million in 2028 at a CAGR of 4.6%. Cumulatively, the market is expected to value US\$881 million, making it one of the largest in the Asian region. These procurements are mainly driven to counter China's much larger and growing fleet of warships and the resultant instability in the Indo-Pacific region.

India: OPVs Market, 2023-2028, US\$ Millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	120	145	145	147	174	150	881

India: OPVs Market, 2023-2028, US\$ Millions



OPVs – Next-Generation Offshore Patrol Vessels

In March 2023, the Indian MoD signed a contract with Goa Shipyard Ltd (GSL) and Garden Reach Shipbuilders and Engineers (GRSE), to develop 11 next-generation offshore patrol vessels, for the Navy. First deliveries for the US\$1.2 billion order are expected to begin in 2026 and culminate in 2031. The vessels are expected to be used for various missions such as anti-piracy, counter-infiltration, anti-poaching, anti-trafficking, non-combatant evacuation operations, search and rescue, protection of offshore assets, and combat.

OPVs– Multi-Purpose Vessels

In March 2022, the Indian Defense Ministry signed a contract with Larsen & Toubro (L&T) for the acquisition of two multi-purpose vessels for a total consideration of US\$116 million. The boats are expected to be deployed for a variety of missions including maritime surveillance, torpedo launch and recovery, and operation of various types of aerial, surface and underwater targets for gunnery anti-submarine warfare firing exercises. They would also be capable of towing ships and providing disaster relief and other humanitarian missions. The OPVs are currently being built at L&T's shipyard at Kattupally, Chennai. The delivery of the first vessel is expected in 2025, while the second is likely to enter service in 2027.

JAPAN

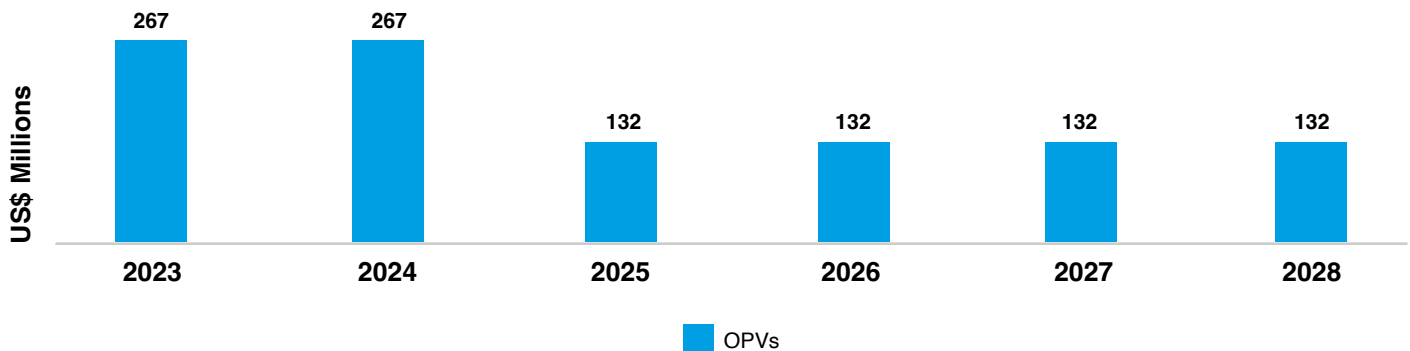


The Japanese market for OPVs is expected to decrease from US\$267 million in 2023 to US\$132 million in 2028, due to the culmination of two programs - Oceanographic Research Vessel and Ocean Surveillance Vessel. It is expected to cumulatively value US\$1.1 billion over the period 2023-2028, thereby making it the largest market for OPVs in the region (excluding China). The three programs in this category include the procurement of 12 patrol vessels, one Oceanographic Research Vessel, and one Ocean Surveillance Vessel, all made by Japan Marine United (JMU) Corporation.

Japan: OPVs Market, 2023-2028, US\$ millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	267	267	132	132	132	132	1,062

Japan: OPVs Market, 2023-2028, US\$ Millions



OPVs – Next-Generation Offshore Patrol Vessels (OPVs)

In June 2022, the Japanese MoD awarded a contract to local shipbuilder Japan Marine United (JMU) Corporation, to construct 12 next-generation OPVs for the Japan Maritime Self-Defense Force (JMSDF). JMU's designs were selected over those given by Mitsubishi Heavy Industries (MHI), who was selected as a sub-contractor on the program. Each of the ships are expected to be 95 meters long, 12 meters wide, and have a standard displacement of 1,920 tons and a maximum speed of 20 knots. They will be powered by a diesel-electric and diesel (CODLAD) propulsion system and will feature autonomous navigation, Intelligence, Surveillance and Reconnaissance (ISR) systems, and deck space for modular payloads. The OPVs are expected to undertake various missions including peacetime warning and monitoring movements of other naval vessels in the Sea of Japan, East China Sea, and Pacific Ocean. The total cost of building the 12 ships is US\$792 million.

SOUTH KOREA

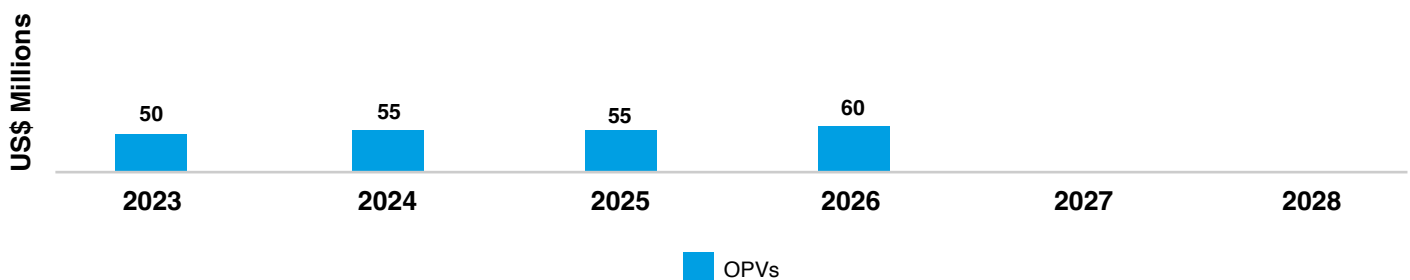


South Korea is the third largest OPV market in Asia with a cumulative spending of US\$220 million over 2023-2028. The market is expected to increase from US\$50 million in 2023 to US\$60 million in 2026. The only program in this category over the period is the procurement of four Chamsuri II-class OPVs made by Hanjin Heavy Industries & Construction (HHIC).

South Korea: OPVs Market, 2023-2028, US\$ Millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	50	55	55	60	-	-	220

South Korea: OPVs Market, 2023-2028, US\$ Millions



OPVs – PKX-B

In November 2022 South Korean shipbuilder HJ Heavy Industries was awarded a contract to build four PKX-B Batch-II fast attack craft (FAC) for the ROK Navy. This contract marked the beginning of batch II of the program, with batch 1 consisting of 16 vessels, all of which have been delivered. The 200-ton fast boats are being procured to replace the Navy’s existing Chamsuri-class fast boats, which were used extensively during South Korea’s first and second naval conflicts in Yeonpyeong in 1999 and 2002. The FACs are expected to be equipped with the 130 mm guided anti-ship missile from LIG Nex1, a 76 mm main gun, an electronic warfare system, advanced anti-ship missile countermeasures and two remotely controlled 12.7 mm machine guns. Each vessel is 44.7 meters in length, 7.1 meters in width and 13 meters in height and has a top speed of 40 knots. It is powered by two GE LM500 gas turbines, and two CAT C32 Acert diesel engines. All ships in this US\$220 million program are expected to be delivered by 2026.

BRAZIL

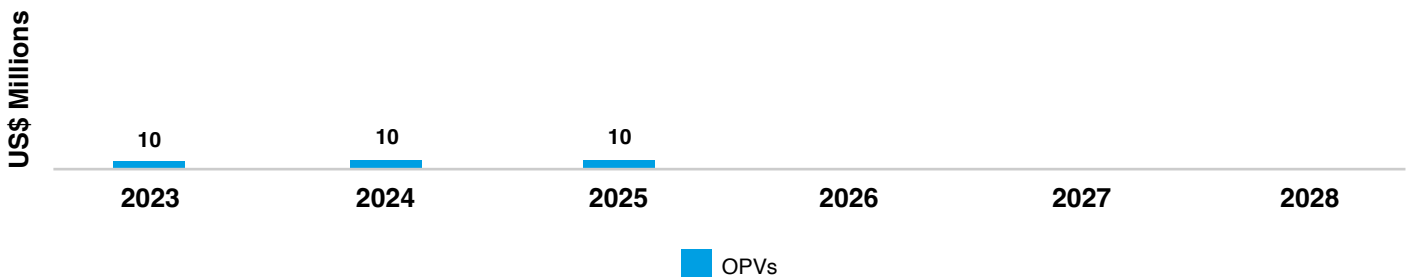


The Brazilian OPV market is expected to cumulatively value US\$30 million over the period 2023-2028, with the sole program being the procurement of four Macaé-class OPVs made by Estaleiro Ilha S/A (EISA).

Brazil: OPVs Market, 2023-2028, US\$ Millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	10	10	10	-	-	-	30

Brazil: OPVs Market, 2023-2028, US\$ Millions



Macaé Class Offshore Patrol Vessels

The contract for Brazil's four Macaé-class offshore patrol vessels (OPVs) was signed with Estaleiro Ilha S/A (EISA) in September 2009. It was then amended in December 2011, to include a fifth ship. However, the Navy revoked the agreement to build the fifth ship in 2016, after EISA didn't deliver the boats on time. The first two ships, the NPa Macaé (70) and NPa Macau (P71) were commissioned from Indústria Naval do Ceará (INACE) in 2009 and 2010, with the third (NPa Maracanã - P-72) commissioned in December 2022. The fourth vessel, the NPa Mangaratiba (P73), is currently being built and is expected to be delivered sometime in 2025. The total program cost has been estimated at around US\$140 million, US\$30 million of which is expected to be spent over the period 2023-2028.

ALGERIA

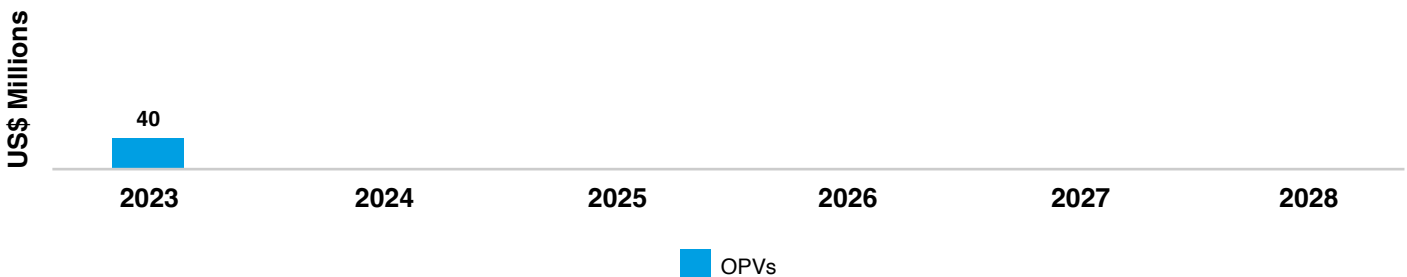


The only Algerian OPV program running through 2023-2028 is the procurement of four Project 22160-class patrol ships that were acquired in 2018 for US\$180 million. The delivery of the final vessel is scheduled for 2023.

Algeria: OPVs Market, 2023-2028, US\$ Millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	40	-	-	-	-	-	40

Algeria: OPVs Market, 2023-2028, US\$ Millions



OPVs – Project 22160

In May 2018, Algeria signed an agreement with Russia to procure four Project 22160-class patrol ships for a cost of US\$180 million. The first unit was delivered in September 2018 and the final one is expected to be delivered sometime in 2023. Each vessel is 308 feet in length, has a range of 6,000 miles, top speed of 30 knots, and can accommodate around 80 people. It is equipped with the Pozitiv-ME1 3D active surface and air search radar and a helicopter hangar. The weapons include the Kalibr-NK cruise missile, and a Shtil-1 vertical launch missile system. The total program cost is US\$180 million.

NIGERIA

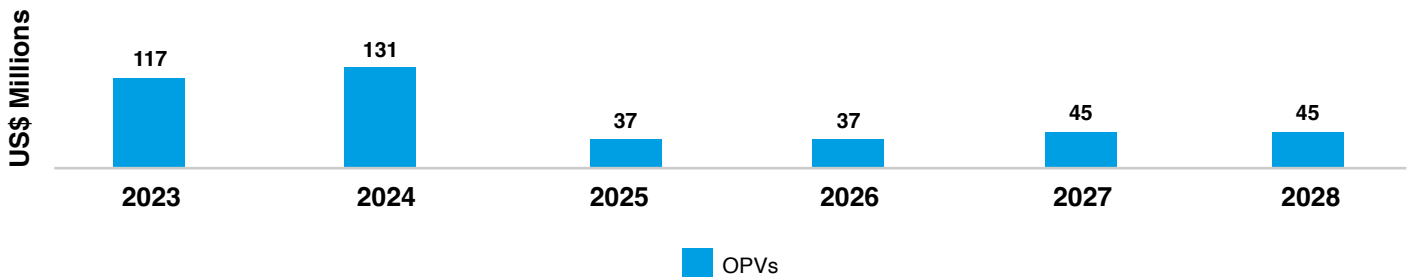


Nigeria is the largest OPV market in Africa with a cumulative spending of almost US\$412 during 2023-2028. The country’s key programs include the procurement of two High Endurance OPVs for US\$240 million and one Long Endurance OPV for US\$120 million.

Nigeria: OPVs Market, 2023-2028, US\$ Millions

Type	2023	2024	2025	2026	2027	2028	2023-2028
OPVs Market	40	-	-	-	-	-	40

Nigeria: OPVs Market, 2023-2028, US\$ Millions



OPVs – High Endurance OPVs

In November 2021, the Nigerian Navy awarded a contract to Turkish shipyard Dearsan for the procurement of two new 76-meter OPVs. The high endurance vessels are being built to carry out tasks such as maritime interdiction, surveillance, anti-smuggling, anti-drug trafficking, special forces operations, search and rescue, disaster management, and land forces fire support. The OPVs are 76.8 meters long, and have a 12 meters beam, 3.3 meters draft, and a displacement of 1,250 tons. The US\$240 million vessels are expected to be delivered by 2024.

OPVs– Rigid Hull Inflatable Boats, Ocean Fast Patrol Boats, and Rigid Hull Inflatable Boats

Nigeria’s 2023 budget includes an allocation of around US\$19 million for the procurement of three 32 metre Ocea fast patrol boats, six special forces boats, and six rigid hull inflatable boats (RHIBs). These vessels are being procured to shore up the country’s defences in the Gulf of Guinea, which is witnessing increasing instances of piracy, armed attacks on ships, sea robberies, illegal fishing, weapons smuggling, narcotics trafficking, illegal mining, and crude oil theft/illegal bunkering. The vessels are expected to be delivered by the end of 2024.

OPVs - 35m Hydrographic Survey Ship

In October 2021, the Nigerian Navy awarded a contract to French shipbuilding company OCEA to construct a new 35-meter hydrographic research vessel. The vessel will be used for various missions including oceanographic/hydrographic operations, oil spill operations, general patrol, search & rescue, and diving support. It will be equipped with multibeam and single beam echosounders, a wet laboratory, and a 5.6 m hydrographic boat fully equipped for surveys in shallow waters. The vessel will be 35 meters long, with a capacity to carry 12 crew and additional passengers, a top speed of 12 knots, and a range of 3000 newton meters. The US\$40 million ship is expected to be delivered latest by 2024.

OPVs - OPV 190, 32m FPB 96, 15m Interceptors

In December 2022, the Nigerian Navy contracted French shipyard Ocea SSM for the construction of nine vessels of varying sizes. These include three 46 meters OPV 190, two 32m FPB 96, and four 15m Interceptors. All vessels are expected to be integrated into the Navy’s Falcon eye Maritime Domain Awareness system. The cost of procurement for all nine ships is around US\$27 million with deliveries expected latest by 2024.

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