# AUTOMATION, ROBOTICS & AUTONOMOUS TECHNOLOGIES

***Supplier Capability Brief***

Automation, robotics and autonomous technologies are transforming defence manufacturing, industrial scale-up and operational systems across all domains. From high-precision automated assembly lines to autonomous UAVs, UGVs and maritime systems, these technologies underpin speed, repeatability, quality, safety and mission effectiveness. As Europe expands defence production capacity, Primes and OEMs require partners capable of delivering robust, scalable and digitally integrated automation and autonomous solutions.

## Core subcategories

- Industrial robotics for assembly, welding, machining and inspection
- Automated production cells, cobots and robotic handling systems
- Autonomous ground, air and maritime platforms (UGVs, UAVs, USVs, UUVs)
- Machine vision, optical inspection and automated quality control
- Robotic integration, tooling, control systems and digital interfaces
- AI-enabled autonomy, navigation, path-planning and mission systems
- Automated materials handling, logistics and warehouse systems
- Safety systems, sensors and robotic-environment monitoring

## Market outlook

*Automation and autonomous technologies represent a rapidly expanding area of defence investment as nations seek to increase industrial throughput, enhance precision, reduce risk, strengthen supply-chain resilience and deploy next-generation autonomous systems.*

*Automation is now viewed as essential for scaling production rates, sustaining quality and enabling defence programmes to meet urgent procurement timelines.*

*Key market indicators:*

- **Defence robotics & autonomous systems:** ~$17B in 2024 : ~$34B by 2030 (CAGR ~12%)
- **Military UAV market:** ~$12B in 2024 : ~$28B by 2030 (CAGR ~14%)
- **Industrial automation for aerospace/defence:** ~$25B globally, growing ~7–9% annually
- **Machine vision & automated inspection:** ~$16B in 2024 : ~$28B by 2030 (CAGR ~9%)
- **European automation and robotics investment accelerating under sovereign manufacturing initiatives**

## Typical defence applications

- Automated machining, welding, joining and fabrication processes
- Robotic inspection, NDT and precision measurement
- Autonomous navigation and mobility systems for UAVs and UGVs
- Automated assembly lines for aerospace, vehicle and munitions production
- AI-driven reconnaissance, surveillance and perimeter-security robotics
- Robotic handling of hazardous materials, energetics and high-risk tasks
- Digital manufacturing cells integrating robotics with MES/ERP systems

## Who should exhibit

- Industrial robotics suppliers and system integrators
- Autonomous platform developers (UGV, UAV, maritime)
- Machine-vision, inspection and NDT automation providers
- Factory-automation, cobot and smart-manufacturing specialists
- AI-enabled autonomy and navigation technology companies
- Robotic tooling, end-effectors and control-system suppliers
- Automated warehousing, logistics and material-handling companies

## What primes & OEMs are looking for

- Automation that increases throughput, precision and repeatability
- Robotics that can safely replace hazardous or labour-intensive processes
- Autonomy, navigation and AI systems for next-gen platforms
- Reliable machine-vision and automated inspection technologies
- Integrators capable of connecting automation to digital manufacturing systems
- Suppliers with proven defence/aerospace experience and compliance
- Scalable robotic systems supporting industrial uplift and multi-shift production

***Showcase your AUTOMATION, ROBOTICS and AUTONOMOUS-TECHNOLOGY capabilities to defence engineering, procurement and programme teams who are ACTIVELY IDENTIFYING and ONBOARDING new suppliers across Europe.***

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