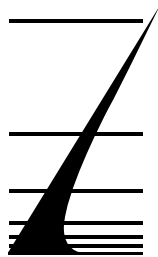


# The Market for Anti-Ship Missiles

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Product Code #F658

A Special Focused Market Segment Analysis by:



**FORECAST** INTERNATIONAL



# Analysis 3

## The Market for Anti-Ship Missiles

### 2009-2018

#### Table of Contents

<b>Executive Summary</b> .....	2
<b>Introduction</b> .....	3
<b>Trends</b> .....	5
<b>Competitive Environment</b> .....	6
<b>Market Statistics</b> .....	12
Table 1 - The Market for Anti-Ship Missiles Unit Production by Headquarters/Company/Program 2009 - 2018 .....	18
Table 2 - The Market for Anti-Ship Missiles Value Statistics by Headquarters/Company/Program 2009 - 2018 .....	22
Figure 1 - The Market for Anti-Ship Missiles Unit Production 2009 - 2018 (Bar Chart) .....	26
Figure 2 - The Market for Anti-Ship Missiles Value of Production 2009 - 2018 (Bar Chart) .....	26
Table 3 - The Market for Anti-Ship Missiles Unit Production % Market Share by Headquarters/Company 2009 - 2018 .....	27
Table 4 - The Market for Anti-Ship Missiles Value Statistics % Market Share by Headquarters/Company 2009 - 2018 .....	29
Figure 3 - The Market for Anti-Ship Missiles Unit Production % Market Share by Headquarters 2009 - 2018 (Pie Chart) .....	31
Figure 4 - The Market for Anti-Ship Missiles Value Statistics % Market Share by Headquarters 2009 - 2018 (Pie Chart) .....	31
<b>Conclusion</b> .....	32

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## PROGRAMS

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The following reports are included in this section: (**Note:** a single report may cover several programs.)

AGM/RGM/UGM-84 Harpoon  
Chinese Anti-Ship Missiles  
Exocet  
Gabriel  
Hsiung Feng I/II  
MILAS  
OTOMAT  
Penguin/AGM-119  
RBS15  
RUR-5A ASROC/Vertical Launch ASROC  
Russian Anti-Ship Missiles  
Sea Killer/Marte Mk 1/Marte Mk 2  
Sea Skua  
South African Anti-Ship Missile  
Type 80 (ASM-1/ASM-2)/Type 88 SSM-1



## Introduction

The anti-ship missile has helped change the nature of naval warfare. However, the foundation for this shift was laid by the desperate efforts of the Japanese military to stave off impending defeat during World War II.

At the beginning of the Second World War, it was a lucky hit if a single bomb or torpedo was able to sink a major surface combatant, especially an aircraft carrier.

Naval warships proved quite resilient. Adding armored decks to aircraft carriers further improved their durability.

It took two large Japanese aerial attacks on the USS *Yorktown* during the Battle of Midway to finally put this aircraft carrier out of action. Although severely damaged and set ablaze by these strikes on June 4, 1942, the *Yorktown* did not sink until June 7.

As the war turned against Japan, its leaders became increasingly desperate. Japan could not keep up with pilot losses. The "Great Marianas Turkey Shoot," which occurred during the Battle of the Philippine Sea (June 19-20, 1944), resulted in the loss of 375 Japanese aircraft, compared with U.S. losses of 123. Many of the U.S. pilots were rescued and able to return to duty, whereas the majority of the Japanese aircrews were lost. This fighting broke the back of Japan's naval air service. Thereafter, the quantity and quality of Japan's pilot and flight crews would decline.

Adding to Japan's troubles was a growing lack of high-quality aviation fuel. Numerous Japanese aircraft were lost when their engines cut out due to low-quality fuel. This lack of fuel was a further hindrance to training.

In the aftermath of this disaster, the Japanese military leadership realized that desperate times called for desperate measures and turned to a new weapon, the Kamikaze, for salvation. Japan could not train pilots fast enough with the necessary proficiency to match their opponents, but it could produce pilots with sufficient flying skills to act as the guidance system for its new strike weapon.

Imperial Japanese Navy Vice Adm. Takashiro Ohnishi, commander of the First Air Fleet in the Philippines, helped conceive the Kamikazes (but was not the first to order suicide operations). He noted that an aircraft crashing into a carrier caused more damage than 10 planes strafing it. Therefore, he formed suicide units and ordered his pilots to crash their aircraft (loaded with high explosives) into enemy naval vessels to inflict the maximum amount of damage on American ships with

the minimal forces available (the First Air Fleet had 40 aircraft in the Philippines).

This concept was quickly proved on October 25, 1944. On that day, the aircraft carrier USS *St. Lo* was attacked by five Zero fighters off the Philippine coast. Although only one Kamikaze actually hit the ship, the resulting fire caused the ship's bomb magazine to explode, sinking the carrier. The success of attacks like the one on the *St. Lo* prompted the Japanese to rapidly expand the program.

Purpose-built Kamikaze aircraft soon appeared, including the Yokosuka MXY7 Ohka. This rocket-powered bomb has been called an anti-ship missile with a human pilot for a guidance system. The first was used in March 1945.

By the end of the Second World War, Japan's naval air service had sent 2,525 Kamikaze pilots to their death, with the Army adding another 1,387 (numerous other Japanese soldiers and sailors died conducting suicide missions that had little influence on the course of the war).

Japanese records claim Kamikazes sank 81 ships and damaged 195. The U.S. military acknowledges the loss of 34 ships, the damaging of another 368 (including 23 aircraft carriers, 5 battleships, 9 cruisers and 23 destroyers), and the death of 4,900 sailors and the wounding of more than 4,800 servicemen as a result of Kamikaze attacks.

The uncoordinated nature of Japanese Kamikaze attacks and the hoarding of these resources for the defense of the home islands degraded their effectiveness. The Japanese had more than 9,000 planes in the home islands available for Kamikaze attack, and more than 5,000 had already been specially fitted for suicide attack to resist the planned invasion.

Of the Kamikazes sent against the U.S. fleet in Leyte Gulf, about one-quarter scored hits or a damaging near-miss.

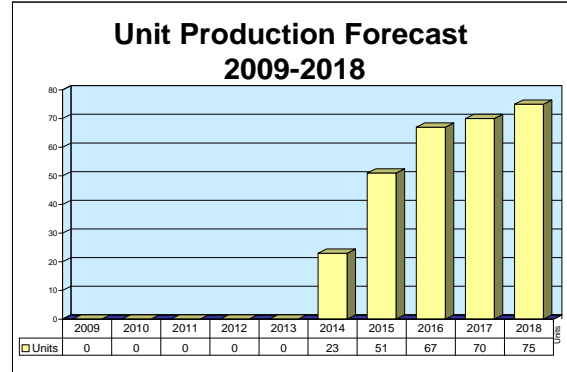
Even with the use of radar, heavy combat air patrols, and massive increases in the number of anti-aircraft guns on U.S. warships, a distressing number of Kamikazes (10-15 percent) were able to successfully crash their aircraft into U.S. surface ships in the last days of the war.



# Sea Skua

## Outlook

- Production nearing conclusion
- United Kingdom has launched the Future Anti-Surface Guided Weapon (FASGW) program
- London split this program into Light and Heavy versions
- MBDA may provide a version of Sea Skua to meet the Heavy portion of this requirement
- FASGW-H production could start in 2013-2014 and enter service around 2015



## Orientation

**Description.** Family of anti-ship missile systems.

**Sponsor.** U.K. Ministry of Defence through the Royal Navy.

**Status.** In production.

**Total Produced.** By the end of 2009, 1,533 Sea Skua missiles (not including RDT&E units) had been produced. Sea Skua production numbers have not been confirmed.

**Application.** Helicopter-launched, all-weather, anti-ship missile system originally conceived for the Lynx helicopter. Sea Skua can also be surface-launched.

**Price Range.** Estimates place the cost of a Sea Skua missile at \$316,600.

## Contractors

### Prime

<b>MBDA, Corporate HQ</b>	<a href="http://www.mbda-systems.com">http://www.mbda-systems.com</a> , 11 Strand, London, WC2N 5RJ United Kingdom, Tel: + 44 207 451 6000, Fax: + 44 207 451 6001, Email: <a href="mailto:css.MBDA-Group@mbda.net">css.MBDA-Group@mbda.net</a> , Prime
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### Subcontractor

<b>BAE Systems Land Systems Munitions &amp; Ordnance</b>	<a href="http://www.baesystems.com/Businesses/LandArmaments">http://www.baesystems.com/Businesses/LandArmaments</a> , Euxton Ln, Chorley, Lancashire, PR7 6AD United Kingdom, Tel: + 44 1257 265511, Fax: + 44 1257 242609, Email: <a href="mailto:media@baesystems.com">media@baesystems.com</a> (Warhead)
<b>Repaircraft plc</b>	<a href="http://www.repaircraft.com">http://www.repaircraft.com</a> , The Common, Cranleigh, GU6 8LU Surrey, United Kingdom, Tel: + 44 1483 273536, Fax: + 44 1483 278078, Email: <a href="mailto:hq@repaircraft.co.uk">hq@repaircraft.co.uk</a> (Propulsion Components)
<b>Roxel UK</b>	<a href="http://www.roxelgroup.com">http://www.roxelgroup.com</a> , Summerfield, Kidderminster, DY117RX Worcestershire, United Kingdom, Tel: + 44 1562 82 40 61, Fax: + 44 1562 8281 26 (Rocket Motor)
<b>SELEX Sensors and Airborne Systems</b>	<a href="http://www.selex-sas.com">http://www.selex-sas.com</a> , Airport Works, Rochester, Kent, ME1 2XX United Kingdom, Tel: + 44 1634844400, Fax: + 44 1634827332 (Semi-Active Radar Homing Head)

## Sea Skua

<b>Thales Airborne Systems</b>	<a href="http://www.thalesgroup.com/aerospace">http://www.thalesgroup.com/aerospace</a> , Centre Charles Nungesser, 2, ave Gay-Lussac, Elancourt, 78851 France, Tel: + 33 1 34 81 60 00, Fax: + 33 1 30 66 79 66 (AHV-7 Radio Altimeter)
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Comprehensive information on Contractors can be found in Forecast International's "International Contractors" series. For a detailed description, go to [www.forecastinternational.com](http://www.forecastinternational.com) (see Products & Samples/Governments & Industries) or call + 1 (203) 426-0800.

Contractors are invited to submit updated information to Editor, International Contractors, Forecast International, 22 Commerce Road, Newtown, CT 06470, USA; [rich.pettibone@forecast1.com](mailto:rich.pettibone@forecast1.com)

## Technical Data

	<u>Metric</u>	<u>U.S.</u>
<b>Dimensions</b>		
Missile length	250 cm	8.20 ft
Missile diameter	28 cm	11.02 in
Missile weight	145 kg	319 lb
Wingspan	72 cm	2.36 in
<b>Performance</b>		
Speed	Mach 0.85	Mach 0.85
Altitude (after air launch)	5-100 m	16.40-328.08 ft
Range (min)	3 km	1.62 nm
Range (max)	15-24 km	8.09-12.95 nm

**Propulsion.** Sea Skua is powered by a solid-propellant boost rocket motor plus a solid-fuel sustainer designated Matapan; both motors are manufactured by Royal Ordnance/Imperial Metal Industries (now part of Roxel). The Matapan sustainer is an alloy-cased motor, using cast double-base propellant. The afflux comes from two nozzles in the main body. The Royal Ordnance Redstart booster is a steel-bodied unit with extruded, double-base propellant. Its afflux comes from the rear of the motor.

**Control & Guidance.** Semi-active radar guidance technology is used on the Sea Skua. The Seaspray radar illuminates and tracks the target. The Super Searcher radar is also compatible with Sea Skua. The missile descends to a sea-skimming flight profile after firing. An altitude reference system maintains this profile until terminal interception. The homing head is provided by BAE Systems. The missile's flight is controlled by four movable wings on the forebody, operated by electrical actuators that are powered by thermal batteries. Four fins at the rear are fixed and indexed at 45 degrees to the

wings. Roll stabilization is incorporated. The missile uses the same radio altimeter as the Exocet, the Thales AHV-7, which BAE Systems manufactures under license.

**Launcher Mode.** Initially, Sea Skua was deployed on the Royal Navy's Lynx helicopters, with each aircraft carrying four missiles. However, Sea Skua is adaptable to a variety of helicopters such as the Sea King and the AB-212. Sea Skua can also be launched from fixed-wing aircraft, including the Britten-Norman Defender 400. Shipborne and shore-based launching systems are also being marketed.

**Warhead.** Semi-armor-piercing, high-explosive warhead, estimated to weigh 35 kilograms (77 lb). The warhead includes 9 kilograms of RDX, wax, and aluminum, with an impact fuze. The warhead is fuzed in order to be detonated within the target, so the charge is sufficient to destroy not only a potential missile launcher but also the small naval craft itself. Royal Ordnance (now part of BAE Systems) provides the Sea Skua's warhead.

## Variants/Upgrades

The Sea Skua was primarily designed as a helicopter-launched anti-ship missile, but BAE Systems has integrated that system with shipborne and land-based platforms. Just prior to the missile's deployment during Operation Desert Storm, the Sea

Skua had been modified to enhance its capabilities against small patrol boats. That modification was an outgrowth of the Iran-Iraq Gulf War experiences. The modifications concentrated on the missile's height-keeping software, attack profile, and warhead

## Sea Skua

detonation programs. Those modifications allowed the Sea Skua to fly lower and strike targets with very little freeboard. Time between warhead impact and detonation was optimized for the small targets.

In 1997, the U.K. contracted Matra BAe Dynamics (now MBDA) to carry out a life extension program for its Sea Skua missiles. Under the contract, the company will artificially age a sample of life-expired Sea Skuas by use of variable extremes of temperature and

vibration. The aging and subsequent testing will be done at the company's Stevenage facility in England. Once completed, any necessary modifications will be implemented. The service-life extension program should allow the Sea Skua missiles to remain in service well into the 21st century.

For additional information, please see the pertinent entries in the **Program Review** section.



Sea Skua

Source: German Navy

## Program Review

**Background.** In 1970, British Aerospace began the development of an anti-ship missile optimized for helicopter deployment, specifically the Lynx. The aim was to develop a light, low-cost anti-ship missile system for the Lynx and similar helicopters, as well as for light aircraft. Sea Skua development was advanced systematically and incorporated existing technology to keep the weapon cost competitive. The decision to utilize a semi-active radar homing head indicates that the British decided to use reliable and proven technology rather than embark on a costly, complex, and totally new system.

Initially used on sea-based Lynx helicopters, the missile deters threats from hostile fast patrol boats, hydrofoils,

and hovercraft. Lynx/Sea Skua completed stringent sea trials in 1979 and performed airborne firing tests of the missile. Flight trials were completed in 1981. A land-based system for coastal defense and one for shipborne applications are also being offered by BAE Systems.

**Combat Experience.** In May 1982, even before the acceptance procedure had been completed, the Lynx/Sea Skua combination scored its first combat successes; in the Falklands War; all missiles hit their intended targets. Although that war provided the Sea Skua with its first successes, the Iraqi invasion of Kuwait on August 2, 1990, offered the greatest number.

## Sea Skua

During the fighting to eject Iraq from Kuwaiti territory, Lynx helicopters armed with Sea Skua anti-ship missiles mauled several Iraqi naval formations. Royal Navy Lynxes operating from the HMS *Brazen* and *Gloucester* attacked a force of 17 Iraqi patrol boats and assault craft heading south just off the Kuwaiti/Saudi border. Using the Sea Skua missile, the British helicopters sank at least four vessels and damaged 12. Farther south, a Lynx from the HMS *Cardiff* sank a large patrol boat. Those Iraqi operations are believed to have been in support of the ill-fated attack on Ra's al Khafji in Saudi Arabia.

In a separate engagement, the Sea Skua damaged a T43 minelayer, left another one burning and dead in the water, and set an ex-Kuwaiti TNC45 (armed with Exocet anti-ship missiles) on fire.

### *Sea Skua Successor Being Studied*

**Sea Skua Follow-on.** The United Kingdom is actively seeking to procure a next-generation helicopter-borne anti-ship missile as a follow-on to Sea Skua. The new missile, known as the Future Anti-Surface Guided Weapon (FASGW), will arm the U.K.'s EH101 Merlin maritime patrol helicopters.

The FASGW will meet the perceived threat of fast attack craft (FAC). FASGW is focused on corvette-sized (and smaller) targets (including missile-firing FAC) and on coastal "soft" land targets. The U.K. would like a missile with considerably greater range than the current Sea Skua – one capable of engaging corvette-sized targets outside the range of the vessel's surface-to-air missiles.

Several studies looking into a successor to the Sea Skua have been performed. One option involves an enhanced Sea Skua. The upgraded missile would have a range of 18 kilometers and possibly an enhanced or all-new seeker. Another option is a cooperative effort with Norway, which is developing the NSM to replace part of its Penguin inventory.

In December 2005, the United Kingdom announced it was splitting the FASGW program into light and heavy components. The FASGW light requirement will be met with a guided rocket. The need for a heavy weapon could see the procurement of a medium-weight missile. The U.K. is interested in meeting the heavy portion of that requirement with a common modular munition.

MBDA will likely provide a missile to meet the heavy portion of this program (Thales could meet the light need) as part of the new Team Complex Weapons. The British government is moving ahead from competition to a strategic partnering agreement. This new team also

involved Thales, QinetiQ, Roxel and the British Ministry of Defence. The offering from MBDA is the Sea Skua IR (Infrared), instead of radar-guided Sea Skua Mk 2. MBDA could offer a version with a radio-frequency seeker.

The U.K. effort is in cooperation with France. France may purchase the missile chosen to meet the FASGW-H requirement. This missile could arm the maritime patrol helicopters for both navies.

**Missile Models.** The Sea Skua missile is offered in multiple launcher configurations.

**Basic Sea Skua.** The semi-active Sea Skua can be preprogrammed to fly at various height profiles en route to the target. Once a target is acquired, the Seaspray radar is positioned to tracking mode. The target can also be identified visually or by electronically generated cross bearings. The pilot can select four basic sea-skimming altitudes that the missile will fly at to the designated target. Missiles can be fired in rapid succession (rippled) and are continuously updated with guidance information from the tracking radar. The fire control system also includes a distance-to-run-to-target indicator. That is important, because the helicopter will be vulnerable to counterattack until the missile impacts or the tracking radar is switched off. The warhead is lethal enough to destroy or neutralize naval craft up to destroyer size.

The proponents of Sea Skua claim that it is a superior weapon system in terms of cost, range, and versatility. In the Falklands War, the Lynx/Sea Skua team proved to be extremely effective. Existing off-the-shelf technology comprises all major components. Ease of operation is also a distinct advantage, and minimal maintenance is required.

The maximum range of the missile is put at 24 kilometers (12.95 nm), which coincides very well with the lock-on range of the Seaspray radar of approximately 12 nautical miles. That gives the helicopter a better than average stand-off capability. Although there are mixed emotions over the semi-active homing feature (the helicopter is directly exposed to counterfire, but the missile receives current target information), the British are convinced that the low radar cross-section of the Lynx, combined with its low-altitude profile, is more than an adequate trade-off. Additionally, Sea Skua was designed to operate in low visibility and rough sea conditions; therefore, sea clutter becomes another advantage for the Lynx/Sea Skua combination. Finally, the pilot can alternate modes of radar operation to deny the enemy counter-target information.

## Sea Skua

Sea Skua SL. British Aerospace's Guided Weapons Division developed a ship-launched version of Sea Skua in the early 1980s. British Aerospace (now BAE Systems) test-fired the ship-launched Sea Skua in late 1988 at the Aberporth firing range in Wales. The test was successful. The launch was conducted from a land-based installation near the ocean to simulate a deck firing. That success also demonstrated the system's coastal battery application, which will use elements of the shipborne variant.

The SL variant, which uses box launchers, weighs 850 kilograms (1,870 lb) in the two-round version. It is designed to be suitable for vessels down to 20 meters (65.6 ft) in length. Dimensions are as follows: length, 250 centimeters (8.20 ft); width, 110 centimeters (3.61 ft); and weight, 850 kilograms (1,870 lb).

The SL uses a Seaspray radar, although BAE officials have said that such systems as the Thales (formerly MEL) Super Searcher can be used for designation and guidance purposes. The launcher boxes double as transport containers. The SL's vertical fin is hooked to a launch shoe that runs down a launch rail so that the system can be canister-launched.

The firing sequence is slightly altered to reduce launch afflux, with the boost motor firing a fraction before the sustainer to take the missile out of its canister. That is in contrast to the air-launched version in which both motors fire simultaneously.

Otherwise, the missile's operation is essentially the same as the airborne application. The operator selects the missile(s) to be fired and chooses the sea-skimming height. Upon firing, the rocket motor ignites as the missile enters its boost phase. As the missile accelerates, the azimuth and height control is initiated. Once the booster burns out, the missile descends to an intermediate height under radio altimeter control before again descending to its final sea-skimming height. Up to four deck-mounted weapons typically would be carried on small craft down to about 20 meters long.

Integration studies have been discussed between BAE and Codag Marine regarding the installation of up to four Sea Skua SL missiles aboard the Bath-based Barracuda fast patrol boat. The 19-meter-long vessel is powered by three water jets and is capable of speeds of 111 kmph. The BAE Systems (formerly Ferranti) Seaspray Mk 3 radar will be housed on an extendable mast to increase surveillance and target acquisition range.

To further interest in the Sea Skua SL, BAE ordered a 21-meter craft, aboard which two Sea Skua SL twin

launchers were installed – one on each side of the quarterdeck. The small craft also carried a masthead-mounted Seaspray 3 radar for target acquisition and illumination, and the associated display and control units were installed in a below-deck operations room. BAE said there was a high level of overseas interest in the ship-launched Sea Skua. India was reportedly interested in the Sea Skua SL, but no order was placed. The first customer for the Sea Skua SL was Kuwait, which placed its order in the mid-1990s. Thailand was rumored to be a customer for the surface-launched version, but that was never confirmed.

Sea Skua Coastal Defense Battery. British Aerospace Dynamics Division revealed in 1988 that it was studying the feasibility of developing a new land-based Coastal Defense Battery variant of the Sea Skua missile. The Coastal Defense Battery is a further development of the ship-launched Sea Skua.

The land-based battery used a 4-ton truck carrying four-canister launchers (probably similar to those to be used on the shipborne version). The vehicle also housed the target acquisition radar and launch control cabin, mounted on top of the system's generator. Radar options included the BAE Systems Seaspray Mk 3, which was already in service on British Royal Navy and Korean Navy Lynx helicopters, and the Thales (formerly MEL) Super Searcher, which had the advantages of a lower personnel requirement and greater mobility. The radar antenna was mounted on a folding mast.

Eight or 10 of those single-fire units (having four ready-to-fire missiles), under the direction of a single battery command post, could form a sector defense system. Alternatively, individual launch units or pairs could be deployed to control chokepoints.

Sea Skua Mk 2. MBDA released details on its Sea Skua Mk 2 in 2006. The missile may meet the Royal Navy's FASGW-H (heavy) requirement, which is to be met in 2014 or 2015.

The Mk 2 replaces the Sea Skua's semi-active radar seeker with an active radar model. The new seeker allows fire-and-forget and ripple fire attacks against multiple targets. Digital electronics are installed, as is a new booster-sustainer motor provided by Roxel UK. The missile has new control surfaces with X-shaped cruciform wings and rear fins. The missile's length is 2.5 meters and its weight is 150 kilograms, but maximum range is now 40 kilometers. The diameter is 25 centimeters.

## Sea Skua

Further proposed improvements include a datalink and an additional seeker (imaging infrared). The Sea Skua IR version could meet the British Future Anti-Surface Guided Weapon (FASGW) – Heavy requirement.

## Related News

**U.K. to Award No-Competition Missile Contracts** – No competition will occur in the awarding of several missile contracts, according to the United Kingdom's Ministry of Defence (MoD). Instead, the MoD will award these contracts to a business partnership – Team Complex Weapons. This group includes MBDA, QinetiQ, Roxel and Thales UK. The contracts will be for concept-phase or assessment-phase.

The programs involved are under the Selection Precision Effects at Range (SPEAR) program. The specific projects include: enhancements to the Storm Shadow cruise missile; new light and heavy missiles for the Royal Navy's helicopters; a replacement for the Sea Wolf shipborne surface-to-air missile; and a loitering munition. (*Defense News*, 7/08)

**New Thales Missile Can Arm UAVs and Helicopters** – Thales UK is offering a new low-cost precision-guided strike missile to equip helicopters and unmanned air vehicles. Work on the Lightweight Multirole Missile began in January 2007.

The LMM uses elements from the Starstreak surface-to-air missile and has already flown on a Scheibel S-100 Camcopter unmanned helicopter. The LMM weighs 13 kg (28 lb), with a 3 kg blast/fragmentation warhead, and is powered by a Roxel two-stage solid rocket motor. The LMM may have a range of 8 km.

Initially, the LMM will use a laser seeker guidance system. A second phase of flight trials will take place in late 2009 or early 2010, with the LMM possibly available for production in 2011. The LMM is to have a unit cost of 50-60 percent of a Starstreak missile (\$54,000-\$64,500).

The LMM may be a solution to the British Royal Navy's Future Anti-Surface Guided Weapon (Light) requirement. The LMM could also have air defense applications for naval vessels and ground vehicles. (*Flight*, 6/08)

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## Funding

Total Sea Skua program funding has been estimated at \$670 million (GBP365 million) through 1989. No additional information has been provided by the British Ministry of Defence concerning Sea Skua funding or whether more money will be allocated to replace missiles used during the fighting in Kuwait.

## Timetable

<u>Month</u>	<u>Year</u>	<u>Major Development</u>
	1970	Design conceived
	1972	Research and development initiated
	1973	Engineering development
	1975	Advanced engineering
	1976	Advanced development
Late	1976	First prototype models
Late	1978	Flight evaluations
Mid	1979	Lynx/Sea Skua evaluations
Sep	1980	Initial production contract awarded
Jun	1981	Initial deliveries, major production contract awarded
	1981	Sea Skua SL development begun
Mar	1982	Initial Operational Capability
	1984	First export sales
Late	1988	First successful firing of shipborne Sea Skua

<u>Month</u>	<u>Year</u>	<u>Major Development</u>
Mid	1988	First export order for shipborne Sea Skua
	1991	Shore-based Sea Skua available/Gulf War successes
Sep	1997	Kuwait signs contract for procurement of Sea Skua
Oct	2001	Malaysia orders Sea Skua
	2015	Sea Skua replacement enters service

## Worldwide Distribution/Inventories

Countries that are said to be interested in Sea Skua include **Brunei, Chile, Oman, and Singapore**. The **South African Navy** is developing a requirement for a helicopter-launched anti-ship missile as part of its larger program to acquire new surface combatants. Six companies have offered proposals to meet South Africa's requirement for six shipborne helicopters.

**User Countries.** Prime users of the Sea Skua include **Bahrain, Brazil, the Federal Republic of Germany, the Republic of Korea, Kuwait, Malaysia, Turkey, and the United Kingdom**. There is talk of a yet-to-be-identified customer in Africa.

## Forecast Rationale

MBDA is likely to provide the United Kingdom's Royal Navy with a new helicopter-launched anti-ship missile. For years, the Sea Skua met this need for the Royal Navy. The Sea Skua first achieved prominence in 1982 during the Falklands War. The missile also saw action during the Persian Gulf fighting in 1990-1991.

### *MBDA Likely Source for New Missile*

Now, the Sea Skua is in its twilight. There are no new orders for this missile. Only purchases by the Royal Navy kept this production program afloat in recent years. Still, MBDA could continue to provide this type of missile to the Royal Navy via its Future Anti-Surface Guided Weapon (FASGW) program. London split this requirement into two parts: a light missile and a heavy missile. The FASGW L (light) will engage small craft

and soft land targets and may be a guided rocket. The FASGW-H (heavy) will replace the Sea Skua on Royal Navy helicopters. The United Kingdom is cooperating with France on this program, which could help to increase overall procurement figures.

Production of the FASGW-H may start in 2013 or 2014, with the missile entering service by 2015. The British government could procure about 400 missiles. Until this missile is available in quantity, the Sea Skua will remain operational with the Royal Navy. The British Royal Navy will keep Sea Skua on active duty through 2020 or even 2024.

Production of the Sea Skua may have concluded. MBDA had hoped to win further export orders for Sea Skua, but none appeared.

## Ten-Year Outlook

ESTIMATED CALENDAR YEAR UNIT PRODUCTION												
Designation or Program	High Confidence					Good Confidence			Speculative			Total
	Thru 2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	
<b>MFR Not Selected</b>												
<b>Sea Skua Follow-On</b>												
	0	0	0	0	0	0	23	51	67	70	75	286
<b>Total</b>	0	0	0	0	0	0	23	51	67	70	75	286



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Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-Mail \_\_\_\_\_

Cardholder Name \_\_\_\_\_

Card# \_\_\_\_\_ Exp. \_\_\_\_\_ csc# \_\_\_\_\_

Billing Address (if different from above) \_\_\_\_\_

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 Bill Company  
(Purchase Order # and Signature Required)  
 Quotation Requested  
 VISA   MasterCard   
 American Express 

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Please include your e-mail address to receive twice-weekly E-Market Alert Newsletters.



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