

Global Indoor-Outdoor Delivery Robots Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Indoor-Outdoor Delivery Robots market size was valued at US\$ 59.47 million in 2025 and is forecast to a readjusted size of US\$ 631 million by 2032 with a CAGR of 35.6% during review period.

Indoor-outdoor delivery robots are low-speed autonomous mobile delivery devices positioned between indoor delivery robots and open-road autonomous delivery vehicles. They are typically composed of a drive-by-wire chassis, cargo box or multi-compartment locker, perception sensors, positioning and communication modules, edge computing platform, dispatching system, and interfaces with access-control and elevator-control systems. These robots can operate across buildings, campuses, communities, sidewalks and other continuous indoor-outdoor mixed environments, delivering food, groceries, parcels, documents, samples and small materials to doors or designated pickup points. Key upstream inputs include aluminum alloys, steel, engineering plastics, lithium batteries, motors and controllers, wheels or tracks, LiDAR, cameras, millimeter-wave radar, ultrasonic sensors, GNSS/IMU/UWB positioning modules, embedded GPU or industrial computing platforms, communication modules, electronic locks, insulation materials, wiring harnesses and structural parts. Major downstream customers include food-delivery and instant-delivery platforms, grocery retailers, restaurant chains, property managers, campus and airport operators, express delivery outlets, industrial parks, hospitals and RaaS operators. On a factory-gate basis, global annualized production capacity in 2025 is estimated at about 15,200 units, with sales volume of about 5,276 units, an average selling price of around USD 10,950 per unit, and hardware sales gross margin of approximately 24%-38%.

The indoor-outdoor delivery robot market is still in the early stage of transition from

commercial validation to scaled deployment. In the near term, these robots are unlikely to directly replace human couriers on a large scale; instead, deployment will first concentrate in campuses, communities, airports, industrial parks, factories, hospitals and selected low-speed open areas. Their core value lies in handling short-distance, high-frequency, small-parcel and relatively repetitive delivery tasks, while forming a hybrid fulfillment system with couriers, drones, autonomous delivery vehicles and on-site staff. As regulations, safety requirements and operating standards for low-speed autonomous delivery devices continue to mature, competition will shift from single-site validation to regional, safe and stable operating capabilities.

Technology development will focus on continuous operation in complex environments, with key directions including multi-sensor fusion, seamless indoor-outdoor positioning, remote supervision, human-robot interaction safety and operational data feedback loops. Current mainstream products mainly rely on the coordination of cameras, LiDAR, millimeter-wave radar, ultrasonic sensors, inertial navigation and communication modules, combining edge autonomy with remote takeover to ensure operating safety. In the future, vision-language navigation, vision-language-action models, world models and simulation training are expected to improve scenario understanding and decision-making capabilities, but system stability and engineering reliability will remain critical in rain, snow, weak light, reflective surfaces, dense pedestrian flows, elevator communication and access-control interactions.

Product design will evolve from general-purpose single models toward scenario-specific, modular and lower-cost platforms. Mainstream products will continue to use wheeled chassis, payloads below 50 kg, closed or semi-open compartments and multi-sensor-fusion navigation, while food delivery, grocery delivery, parcel delivery, community e-commerce, campus logistics and medical sample transport will drive the adoption of multi-locker compartments, insulated boxes, battery-swapping modules, elevator and access-control interfaces, robotic-arm-ready interfaces and higher-passability chassis. As deployment scales up, supply chains mature and key component costs decline, robot unit prices are expected to continue decreasing, while business models will expand from pure hardware sales to software subscriptions, leasing, RaaS operation and fulfillment-network monetization.

The main constraints on industry development remain right-of-way policies, public safety, data compliance, operating costs and social acceptance. Indoor-outdoor delivery robots operate in a more complex environment than purely indoor robots or road-going autonomous delivery vehicles, as they must deal with sidewalks, community roads, buildings, elevators, access gates and temporary obstacles, while also interacting with

pedestrians, pets, children, couriers and vehicles. Future market growth will depend on clearer policy access boundaries, higher robot uptime and lower takeover rates in complex environments, and the ability of operators to build charging, maintenance, remote monitoring, route inspection, insurance and public communication systems. Overall, the industry has strong growth potential, but large-scale adoption will vary by region and advance step by step across different application scenarios.

This report is a detailed and comprehensive analysis for global Indoor-Outdoor Delivery Robots market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Indoor-Outdoor Delivery Robots market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Indoor-Outdoor Delivery Robots market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Indoor-Outdoor Delivery Robots market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Indoor-Outdoor Delivery Robots market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Indoor-Outdoor Delivery Robots

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Indoor-Outdoor Delivery Robots market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Starship Technologies, Serve Robotics, Coco Robotics, RIVR, Avride, DoorDash, Robot.com, Cartken, Ottonomy.IO, Neubility, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Indoor-Outdoor Delivery Robots market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Vision-based

LiDAR-based

Market segment by Payload Capacity

Below 10 kg

10-50 kg

50-100 kg

Above 100 kg

Market segment by Mobility Form

Wheeled

Legged-wheeled

Other

Market segment by Application

Food Delivery

Grocery and Retail Delivery

Parcel and Express Delivery

Community E-commerce Delivery

Other

Major players covered

Starship Technologies

Serve Robotics

Coco Robotics

RIVR

Avride

DoorDash

Robot.com

Cartken

Ottonomy.IO

Neubility

ROBO-HI

LOMBY

OTSAW Digital

HelloWorld Robotics

Infermove

Meituan

ZhenRobot

Alpha Robotics

Sophon Auto

Eventec

Rongyun Innovation

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of

Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Indoor-Outdoor Delivery Robots product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Indoor-Outdoor Delivery Robots, with price, sales quantity, revenue, and global market share of Indoor-Outdoor Delivery Robots from 2021 to 2026.

Chapter 3, the Indoor-Outdoor Delivery Robots competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Indoor-Outdoor Delivery Robots breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Indoor-Outdoor Delivery Robots market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Indoor-Outdoor Delivery Robots.

Chapter 14 and 15, to describe Indoor-Outdoor Delivery Robots sales channel, distributors, customers, research findings and conclusion.

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