

Global ROV and AUV Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global ROV and AUV market size was valued at US\$ 604 million in 2025 and is forecast to a readjusted size of US\$ 1669 million by 2032 with a CAGR of 16.7% during review period.

ROV (Remotely Operated Vehicle) is an underwater robot remotely controlled by an operator via cable or wireless communication, mainly used for ocean exploration, inspection of oil and gas platforms, maintenance of subsea infrastructure, and scientific research. ROVs are typically equipped with cameras, sensors, and robotic arms, allowing precise operations in deep-sea high-pressure environments, but their operational range is limited by tether length or communication bandwidth.

AUV (Autonomous Underwater Vehicle) is an underwater robot capable of performing missions independently without real-time human control, based on pre-programmed tasks or intelligent algorithms. AUVs usually feature high-precision navigation systems, sonar sensors, and onboard data processing capabilities, and are widely used in oceanographic research, geological exploration, and military reconnaissance. Compared with ROVs, AUVs offer greater mobility and flexibility but require higher battery endurance and autonomous decision-making capabilities.

From the manufacturers' perspective, the leading global players in AUVs and ROVs include Teledyne Marine Technologies, VideoRay, General Dynamics, Saab Seaeye, and Shenzhen Qianxing Innovation Technology Co., Ltd. In 2025, the top five companies accounted for 36.44% of global revenue. Competition is expected to intensify over the coming years, particularly in the Chinese market.

In the industrial segment, AUVs and ROVs are undergoing a shift from "single-use

tools” to “resident systems.” Traditional mothership-dependent operations, constrained by high costs and weather conditions, are being replaced by long-term deployment of docked underwater robots. This approach has demonstrated unparalleled advantages in infrastructure maintenance, such as offshore wind farm operations and subsea cable inspection, reducing operational costs by nearly 30%. At the same time, the integration of artificial intelligence has endowed AUVs with enhanced physical priors, enabling complex real-time obstacle avoidance and target classification even in extreme low-light and low-communication deep-sea environments, significantly improving exploration efficiency.

In the consumer and civil markets, 2026 is expected to mark the “year of mass adoption” for AUVs and ROVs. Thanks to advances in core algorithms and decreasing hardware costs, detection devices that once cost tens of thousands of dollars are now available as consumer electronics priced in the low thousands. Diving and underwater photography enthusiasts can now use miniature ROVs equipped with 8K ultra-high-definition cameras and underwater color-correction algorithms to explore the seabed from shore via VR perspectives. Meanwhile, in the aquaculture sector, intelligent farming solutions have turned underwater robots into “electronic eyes” for fishery operators, enabling tasks from fish health monitoring to automatic cage cleaning. The adoption of small-scale consumer robots is experiencing exponential growth across the Asia-Pacific region.

However, the rapid expansion of technology is encountering significant geopolitical and tariff barriers. Between 2025 and 2026, major economies implemented multiple rounds of tariff adjustments on critical components such as precision sensors, high-performance batteries, and servo motors. High tariffs on key electromechanical parts have directly increased the manufacturing costs of high-end ROVs, forcing a dramatic “localization” of global supply chains. Chinese manufacturers, leveraging their scale advantages in the electronics industry, still hold approximately 70% of the consumer-grade market, while actively pursuing overseas production and domestic sourcing of core components to mitigate tariff-driven cost pressures.

Currently, research in the AUV and ROV industry is focused on extending operational endurance and enabling cross-medium communication. The practical application of solid-state batteries has significantly extended the range of long-distance AUVs, while the maturation of blue-green laser communication has partially addressed bandwidth limitations for underwater data transmission. On the regulatory front, countries are increasingly tightening the security control of subsea geographic data, requiring the industry to establish comprehensive data anonymization and compliance systems

alongside technological innovation.

Looking ahead, the AUV and ROV industry is expected to continue deep integration across both “industrial heavy-duty” and “consumer-oriented” dimensions. Although trade frictions cast a shadow over the global supply chain, the fundamental human drive to explore the oceans and develop marine resources remains undiminished. As robots achieve human-like capabilities for complex collaboration and dexterous operations in the deep sea, the digital transparency of the blue world will reach unprecedented levels.

This report is a detailed and comprehensive analysis for global ROV and AUV market. Both quantitative and qualitative analyses are presented by company, 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 ROV and AUV market size and forecasts, in consumption value (\$ Million), 2021-2032

Global ROV and AUV market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global ROV and AUV market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global ROV and AUV market shares of main players, in revenue (\$ Million), 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 ROV and AUV

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 ROV and AUV market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of

this study include Teledyne Marine Technologies, VideoRay, General Dynamics, Saab Seaeye, Chasing Innovation Technology Co., Ltd. / CHASING, ZhenDui Industry Artificial Intelligence Co., Ltd., Kongsberg Maritime, Oceaneering, DeepBlue Marine Technology Co., Ltd., Huntington Ingalls Industries, etc.

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

Market segmentation

ROV and AUV 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. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

AUV

ROV

Glider

Buoy

Market segment by Propulsion Mechanism

Torpedo-Shaped

Box-Shaped

Flat/Wing-Shaped

Market segment by Shape and Hydrodynamics

Propeller-Driven

Buoyancy-Driven

Bionic/Bio-inspired

Market segment by Application

Civil Use

Military Use

Market segment by players, this report covers

Teledyne Marine Technologies

VideoRay

General Dynamics

Saab Seaeye

Chasing Innovation Technology Co., Ltd. / CHASING

ZhenDui Industry Artificial Intelligence Co., Ltd.

Kongsberg Maritime

Oceaneering

DeepBlue Marine Technology Co., Ltd.

Huntington Ingalls Industries

Exail Technologies

QYSEA FIFISH (Shenzhen QYSEA Technology Co., Ltd.)

Shandong Future Robot Co., Ltd.

Qingdao Robotfish Marine Technology Co., Ltd.

Boya Gongdao (Beijing) Robotics Technology Co., Ltd.

Blue Robotics

SEALIEN Robotics Co., Ltd.

Market segment by regions, regional analysis covers
North America (United States, Canada and Mexico)
Europe (Germany, France, UK, Russia, Italy and Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)
South America (Brazil, Rest of South America)
Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe ROV and AUV product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of ROV and AUV, with revenue, gross margin, and global market share of ROV and AUV from 2021 to 2026.

Chapter 3, the ROV and AUV competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and ROV and AUV market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of ROV and AUV.

Chapter 13, to describe ROV and AUV research findings and conclusion.

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