

Global ROV and AUV Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global ROV and AUV market size is expected to reach \$ 1669 million by 2032, rising at a market growth of 16.7% CAGR during the forecast period (2026-2032).

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 studies the global ROV and AUV demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for ROV and AUV, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of ROV and AUV that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global ROV and AUV total market, 2021-2032, (USD Million)

Global ROV and AUV total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: ROV and AUV total market, key domestic companies, and share, (USD Million)

Global ROV and AUV revenue by player, revenue and market share 2021-2026, (USD Million)

Global ROV and AUV total market by Type, CAGR, 2021-2032, (USD Million)

Global ROV and AUV total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major 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.

Stakeholders would have ease in decision-making through various strategy matrices

used in analyzing the world ROV and AUV market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global ROV and AUV Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global ROV and AUV Market, Segmentation by Type:

AUV

ROV

Glider

Buoy

Global ROV and AUV Market, Segmentation by Propulsion Mechanism:

Torpedo-Shaped

Box-Shaped

Flat/Wing-Shaped

Global ROV and AUV Market, Segmentation by Shape and Hydrodynamics:

Propeller-Driven

Buoyancy-Driven

Bionic/Bio-inspired

Global ROV and AUV Market, Segmentation by Application:

Civil Use

Military Use

Companies Profiled:

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.

Key Questions Answered

1. How big is the global ROV and AUV market?
2. What is the demand of the global ROV and AUV market?
3. What is the year over year growth of the global ROV and AUV market?
4. What is the total value of the global ROV and AUV market?
5. Who are the Major Players in the global ROV and AUV market?
6. What are the growth factors driving the market demand?

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