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Global Underwater Robotics Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Underwater Robotics market size is expected to reach $ 3544 million by 2032, rising at a market growth of 17.3% CAGR during the forecast period (2026-2032).

Underwater robotics refers to uncrewed or diver-assisting robotic systems designed to operate below the water surface and perform observation, survey, inspection, monitoring, sampling, transportation, intervention, security, research or recreational missions. A complete underwater robotic system generally consists of a pressure-resistant or watertight structure, buoyancy materials, propulsion or buoyancy-control equipment, power supply, navigation and positioning instruments, underwater communication devices, cameras, sonar, mission sensors, onboard computing and control software, together with manipulators, samplers or specialised tools where physical intervention is required. The product boundary includes tethered ROVs, untethered AUVs and underwater gliders, underwater propulsion robots, and hybrid AUV/ROV platforms. NOAA distinguishes ROVs as unoccupied vehicles operated from the surface through a physical connection, while AUVs conduct missions independently without a permanent tether. Underwater gliders are low-power autonomous vehicles that generate forward motion by changing buoyancy and glide angle, allowing them to conduct long-duration ocean observation missions.

ROVs are remotely operated underwater vehicles that remain connected to a surface vessel, platform or shore station by a tether or umbilical. The connection provides real-time control and data transmission and may also supply electrical or hydraulic power. ROVs range from portable observation systems to large work-class platforms equipped with manipulators and intervention tools. AUVs and underwater gliders operate without a permanent tether and use onboard batteries, navigation systems, sonar and computers to execute pre-programmed or adaptive missions. AUVs are suitable for high-

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resolution mapping, reconnaissance and targeted surveys, while gliders are optimised for low-power, long-endurance environmental observation. Commercial AUV platforms such as Kongsberg's HUGIN integrate navigation, interchangeable batteries and multiple survey sensors for autonomous subsea data collection.

Underwater propulsion robots are a report-specific product category covering compact electrically propelled devices that provide underwater thrust for divers, swimmers or small payloads. They normally include handheld underwater scooters, powered flotation devices and related intelligent propulsion platforms. Unlike survey AUVs, these products generally do not conduct independent seabed-mapping missions; their primary purpose is to improve underwater mobility, reduce physical effort or support recreational, rescue and short-distance operational activities. SUBLUE, for example, offers underwater scooters, powered floats and related underwater sports equipment for individual and professional users.

Hybrid AUV/ROV systems combine autonomous navigation with remote-control or tethered intervention capabilities. They may travel autonomously over a wide area, collect survey data and identify targets before switching to supervised or tethered operation for real-time video, high-bandwidth communication or physical intervention. Hybrid platforms can reduce the requirement for continuous vessel support while retaining the precision and human decision-making advantages of an ROV. This category includes vehicles that switch between autonomous and remotely operated modes and resident underwater robots capable of operating from subsea docking and recharging stations.

In 2025, global Underwater Robotics production reached approximately 228.9 k units, with an average global market price of around US$ 4.8 k per unit

The main upstream structural materials include marine-grade aluminium alloys, titanium alloys, stainless steel, engineering plastics, carbon-fibre composites, glass-fibre composites, electric thrusters, hydraulic power units, propellers, battery, etc. Representative suppliers include ATI, TIMET, Kaiser Aluminum, Constellium, Kraken Robotics, etc.

Underwater Robotics are mainly used in offshore energy, defence and homeland security, science and research, underwater infrastructure and utilities, aquaculture and fisheries, media, leisure and tourism, etc. In offshore energy, Underwater Robotics are used for subsea pipeline and cable surveys, offshore platform inspection, well and valve intervention, offshore wind foundation inspection, cable route survey, leak detection,

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construction support and decommissioning. Major customers include Shell, BP, Equinor, TotalEnergies, Petrobras, etc.

There is no single industry-wide gross margin because Underwater Robotics range from standardised portable systems to highly customised deep-water work-class and defence platforms. The gross margin for underwater robot is generally 25%–50%.

The global Underwater Robotics market comprises ROVs, AUVs and underwater gliders, underwater propulsion robots, and hybrid AUV/ROV systems. ROVs maintain a real-time connection with a surface vessel, platform or shore station through a tether or umbilical, enabling continuous video transmission, operator control and physical intervention. They range from portable observation vehicles to large work-class systems equipped with manipulators, hydraulic tools and subsea construction equipment. AUVs operate without a permanent tether and use onboard power, navigation, sonar and mission software to conduct autonomous seabed mapping, environmental monitoring, reconnaissance and target identification. Underwater gliders form a long-endurance, low-power autonomous category that uses buoyancy changes and hydrodynamic lift to collect oceanographic data over extensive areas. Underwater propulsion robots provide electrically powered underwater thrust for divers, swimmers or compact payloads and are mainly used in diving support, rescue, recreation and short-distance underwater transport. Hybrid AUV/ROV systems combine autonomous navigation with supervised or tethered operation, allowing a vehicle to conduct wide-area surveys independently and then switch to real-time inspection, high-bandwidth communication or mechanical intervention. The market is therefore developing from single-purpose vehicles toward modular platforms combining autonomy, sensing, communications, propulsion and intervention functions.

Underwater robotics is used across offshore energy, defence and homeland security, science and research, underwater infrastructure and utilities, aquaculture and fisheries, media, leisure and tourism, and other end uses. Offshore energy applications include oil and gas field inspection, wellhead and valve intervention, offshore wind foundation inspection, subsea pipeline and cable survey, construction support, leak detection, maintenance and decommissioning. Defence and homeland security applications include mine countermeasures, explosive-ordnance disposal, harbour protection, anti-submarine support, intelligence collection, hull inspection, coastal surveillance and protection of underwater critical infrastructure. Science and research users deploy robotic systems for seabed mapping, biological observation, geological sampling, polar research, hydrothermal-vent exploration, climate monitoring and underwater archaeology. Underwater infrastructure and utilities applications include inspection of

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dams, reservoirs, hydropower facilities, nuclear cooling-water systems, bridges, tunnels, ports, drinking-water tanks and telecommunications cables. Aquaculture and fisheries users inspect cage nets, anchors, mooring systems and feeding equipment while monitoring fish health, mortality and seabed conditions. Media, leisure and tourism applications include underwater filming, documentary production, aquarium operation, wreck exploration, recreational diving, resort activities and marine tourism. Other end uses include police search and recovery, firefighting support, salvage, customs inspection, environmental enforcement, industrial-tank inspection, education and commercial-diving safety.

Competition includes specialised ROV manufacturers, autonomous-platform developers, defence contractors, offshore engineering groups and emerging Asian robotics companies. VideoRay, SEAMOR Marine, L3Harris AGEOTEC, Saab Seaeye, Deep Ocean Engineering and Deepinfar maintain established positions in observation, inspection and light-intervention vehicles. Oceaneering International combines in-house ROV manufacturing with a large global operating fleet, while TechnipFMC and Forum Energy Technologies supply high-value work-class and heavy work-class systems. Zhuzhou CRRC Times Electric through SMD, Kystdesign, Argus Remote Systems, Shandong Future Robot, DWTEK and Ocean Modules Sweden participate in deep-water, project-specific and work-class vehicle markets. TKMS focuses on military unmanned underwater systems and mine-countermeasure platforms. QYSEA Technology, Chasing-Innovation Technology, Exail, Deep Trekker and Blue Robotics expand the market for compact, modular and professional underwater vehicles. Kongsberg, Huntington Ingalls Industries, General Dynamics Mission Systems and Teledyne Technologies are important suppliers of autonomous underwater platforms for hydrographic, scientific, offshore and defence missions. SeaDronix represents an emerging Chinese participant in intelligent marine robotics, while Mitsubishi Heavy Industries and Kawasaki Heavy Industries contribute Japanese capabilities in defence-oriented and autonomous underwater systems. FullDepth supplies Japanese-manufactured ROVs for industrial inspection, marine research and public-sector applications. Competitive advantage increasingly depends on depth rating, endurance, payload capacity, navigation accuracy, autonomy, software architecture, sonar integration, reliability, lifecycle support and the ability to provide mission-specific solutions.

Market growth is being driven by continued investment in offshore oil and gas, offshore wind and subsea cable infrastructure; rising naval expenditure and demand for unmanned mine-countermeasure and surveillance systems; increasing inspection requirements for ageing dams, ports, pipelines, ships and underwater utilities; growing

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concern over diver safety in deep, polluted, confined and high-current environments; advances in batteries, electric propulsion, acoustic communications, inertial navigation, sonar, machine vision and artificial intelligence; expansion of aquaculture and the need for frequent net and mooring inspection; increasing scientific demand for ocean, climate and seabed data; and the growth of underwater media, tourism and recreational products. The development of resident subsea robots, remote operations centres, standard payload interfaces and autonomous docking stations is also reducing dependence on permanently crewed support vessels and improving system utilisation.

Market expansion is restrained by the high acquisition cost of deep-water vehicles, sensors, control cabins, launch-and-recovery systems and support vessels; long engineering, qualification, pressure-testing and sea-trial cycles for customised products; limited underwater communication bandwidth and signal reliability; battery endurance and recharging constraints for autonomous systems; navigation difficulties in deep water, under ice and near complex structures; corrosion, high pressure, biofouling, turbidity and strong-current conditions that increase maintenance requirements; shortages of experienced pilots, subsea engineers, software specialists and maintenance personnel; cybersecurity, defence export controls and local-content requirements; environmental permitting and restrictions on seabed activities; and customer sensitivity to offshore project delays, energy-price fluctuations and public procurement cycles. Competition from low-cost consumer underwater products can also compress pricing in the entry-level segment, while dependence on specialised sensors, pressure housings and marine-grade electronic components creates supply-chain risk.

Report Scope

This report studies the global Underwater Robotics production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Underwater Robotics 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 Underwater Robotics that contribute to its increasing demand across many markets.

Highlights and key features of the study

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Global Underwater Robotics total production and demand, 2021-2032, (Units)

Global Underwater Robotics total production value, 2021-2032, (USD Million)

Global Underwater Robotics production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Underwater Robotics consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Underwater Robotics domestic production, consumption, key domestic manufacturers and share

Global Underwater Robotics production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Underwater Robotics production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Underwater Robotics production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Underwater Robotics market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include VideoRay, SEAMOR Marine, L3Harris(AGEOTEC), Saab Seaeye, Deep Ocean Engineering, Deepinfar, Oceaneering International, TechnipFMC, Forum Energy Technologies, Zhuzhou CRRC Times Electric (SMD), 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 Underwater Robotics market

Detailed Segmentation:

Global Underwater Robotics Supply, Demand and Key Producers, 2026-2032

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Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (K US$/Unit) by manufacturer, 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 Underwater Robotics Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Underwater Robotics Market, Segmentation by Type:

ROV (Remotely Operated Vehicle)

AUV and Underwater Gliders

Underwater Propulsion Robots

Hybrid AUV/ROV

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Global Underwater Robotics Market, Segmentation by Working Depth:

Below 100m

101–300 m

301–1,000 m

1,001–3,000 m

Above 3,000 m

Global Underwater Robotics Market, Segmentation by Operational Capability:

Observation-Class

Inspection and Light-Work

Work-Class

Heavy-Work and Special-Purpose

Others

Global Underwater Robotics Market, Segmentation by Application:

Offshore Energy

Defence and Homeland Security

Science and Research

Underwater Infrastructure and Utilities

Aquaculture and Fisheries

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Media, Leisure and Tourism

Other End Uses

Companies Profiled:

VideoRay

SEAMOR Marine

L3Harris(AGEOTEC)

Saab Seaeye

Deep Ocean Engineering

Deepinfar

Oceaneering International

TechnipFMC

Forum Energy Technologies

Zhuzhou CRRC Times Electric (SMD)

Kystdesign

Argus Remote Systems

Shandong Future Robot

DWTEK

Ocean Modules Sweden

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TKMS

QYSEA Technology

Chasing-Innovation Technology

Exail (Eca Group)

Deep Trekker

Blue Robotics

Kongsberg

Huntington Ingalls Industries

General Dynamics Mission Systems

Teledyne Technologies

SeaDronix

Mitsubishi Heavy Industries

Kawasaki Heavy Industries

FullDepth

Key Questions Answered:

1. How big is the global Underwater Robotics market?
2. What is the demand of the global Underwater Robotics market?
3. What is the year over year growth of the global Underwater Robotics market?
4. What is the production and production value of the global Underwater Robotics market?
5. Who are the key producers in the global Underwater Robotics market?
6. What are the growth factors driving the market demand?

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