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

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Abstracts

The global Underwater Robots market size is expected to reach $ 2985 million by 2032, rising at a market growth of 16.7% CAGR during the forecast period (2026-2032).

Underwater robots are unmanned robotic systems designed to operate below the water surface and perform observation, survey, inspection, sampling, intervention, monitoring, maintenance or security missions. A complete underwater robot generally consists of a pressure-resistant vehicle structure, buoyancy material, propulsion or buoyancy-control system, power supply, navigation and positioning system, underwater communications equipment, cameras and sonar, mission sensors, control software and, where required, manipulators or other task-specific tools. Depending on the operating mode, underwater robots are divided into ROVs, AUVs and underwater gliders, and hybrid AUV/ROV systems. The ROVs are equipment connected to and controlled from a surface platform, while AUVs operate without a physical tether and conduct pre-programmed missions independently. Underwater gliders are a highly energy-efficient form of autonomous vehicle that use changes in buoyancy and hydrodynamic lift for long-duration ocean observation. Hybrid vehicles combine autonomous navigation with tethered real-time control and intervention capabilities.

In 2025, global Underwater Robots production reached approximately 50.1 k units, with an average global market price of around US$ 19.3 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.

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Underwater robots 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 robots are used for subsea pipeline and cable surveys, offshore platform inspection, well and valve intervention, offshore wind foundation inspection, cable route survey, leak detection, construction support and decommissioning. Major customers include Shell, BP, Equinor, TotalEnergies, Petrobras, etc.

There is no single industry-wide gross margin because underwater robots 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 Remotely Operated Vehicle (ROV) is an uncrewed underwater robotic vehicle that is primarily controlled in real time by an operator located on a surface vessel, offshore platform, or shore-based control station. Most ROVs are physically connected to the surface control system through a tether or umbilical cable, which transmits control commands, real-time video, sonar data, and other sensor information. For larger work-class ROVs, the umbilical may also supply electrical or hydraulic power to the vehicle and its onboard tools. ROVs are widely used for underwater observation, inspection, search and recovery, scientific research, sampling, maintenance, installation, and intervention operations. AUVs and underwater gliders operate without a permanent tether and rely on onboard power, navigation, sensing and mission-control systems to conduct autonomous surveys, environmental monitoring and reconnaissance. AUVs are generally suited to high-resolution seabed mapping and targeted underwater missions, while underwater gliders emphasise long endurance, low power consumption and wide-area ocean observation. Hybrid AUV/ROV systems combine autonomous navigation with remote-control or tethered intervention functions, enabling a vehicle to conduct wide-area surveys independently and then switch to real-time inspection or physical intervention when required. As subsea missions become more complex, the market is gradually shifting from single-function vehicles toward modular, intelligent and multi-mode robotic platforms.

Underwater robots are 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 represents a major application field, where underwater robots inspect offshore oil and gas platforms, subsea pipelines, wellheads, valves, offshore wind foundations and submarine power cables, while also supporting construction, maintenance, decommissioning and

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environmental monitoring. In defence and homeland security, the systems are deployed for mine countermeasures, harbour protection, explosive-ordnance disposal, intelligence collection, hull inspection, anti-submarine support and coastal surveillance. Science and research applications include seabed mapping, hydrothermal-vent exploration, biological and geological sampling, polar research, ocean-current monitoring and climate-data collection. In underwater infrastructure and utilities, robotic systems inspect dams, reservoirs, hydropower facilities, nuclear cooling-water systems, bridges, tunnels, ports, communication cables and municipal water infrastructure. Aquaculture and fisheries users apply underwater robots to inspect cage nets, anchors and mooring systems, monitor fish health, assess seabed conditions and reduce diver exposure. Media, leisure and tourism applications include underwater filming, documentary production, aquarium operations, wreck exploration and marine tourism. Other end uses include underwater search and rescue, police operations, firefighting support, salvage, customs inspection, environmental enforcement, education and commercial-diving support.

Competition in the underwater robots market is characterised by the coexistence of specialised portable-ROV manufacturers, deep-water work-class system suppliers, autonomous-vehicle specialists and diversified marine technology groups. VideoRay, SEAMOR Marine, L3Harris AGEOTEC, Saab Seaeye, Deep Ocean Engineering, Deepinfar, Exail, Deep Trekker and Blue Robotics maintain strong positions in portable, observation-class and light-work-class ROVs. Oceaneering International, TechnipFMC, Forum Energy Technologies, Zhuzhou CRRC Times Electric through SMD, Kystdesign, Argus Remote Systems, Shandong Future Robot, DWTEK and Ocean Modules Sweden compete in deep-water, work-class and project-specific ROV systems. TKMS focuses primarily on defence-oriented unmanned underwater platforms and mine-countermeasure systems, while QYSEA Technology and Chasing-Innovation Technology have expanded the accessibility of compact professional and prosumer underwater robots. In autonomous underwater systems, Kongsberg, Huntington Ingalls Industries, General Dynamics Mission Systems and Teledyne Technologies offer established AUV platforms for hydrographic, scientific, defence and offshore applications. SeaDronix represents an emerging Chinese supplier of intelligent underwater vehicles and marine robotic systems. The competitive landscape is increasingly influenced by vehicle depth rating, endurance, payload capacity, autonomy, navigation accuracy, artificial-intelligence functions, sensor integration, operational reliability and global after-sales support.

Market growth is being driven by the continuing expansion of offshore oil and gas development, offshore wind construction and submarine power-cable installation, all of

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which require regular subsea inspection, survey and maintenance. Increasing investment in naval modernisation, mine countermeasures, port security and unmanned maritime systems is supporting demand from defence and homeland-security customers. The ageing of dams, bridges, pipelines, ports and other underwater infrastructure is creating a sustained need for non-destructive inspection and condition monitoring. Rapid advances in batteries, pressure-resistant electronics, acoustic communications, inertial navigation, sonar, machine vision and artificial intelligence are improving vehicle endurance, autonomy and data quality while reducing dependence on large support vessels. The need to reduce diver exposure in deep, polluted, confined or high-current environments is accelerating the replacement of manual underwater operations with robotic systems. Growing demand for marine scientific data, climate monitoring, seabed-resource assessment and polar research is also supporting AUV and underwater-glider deployments. In addition, the expansion of aquaculture, underwater media production, marine tourism and remotely operated inspection services is broadening the commercial customer base beyond traditional offshore and defence users.

Market development is nevertheless constrained by the high acquisition cost of deep-water vehicles, launch and recovery systems, surface-control equipment, sensors and support vessels. Customised work-class and defence systems involve lengthy engineering, qualification, pressure testing and sea-trial processes, resulting in long delivery cycles and substantial project risk. Underwater communications remain limited by low bandwidth, latency, signal attenuation and environmental interference, restricting real-time control and high-volume data transmission for autonomous vehicles. Navigation accuracy can deteriorate in deep water, under ice, close to complex structures or in areas without reliable acoustic reference networks. Battery endurance, charging infrastructure and energy density continue to limit long-duration autonomous operations, particularly when vehicles carry power-intensive sonar, lighting or manipulation equipment. Harsh underwater conditions, including corrosion, pressure, biofouling, turbidity and strong currents, increase maintenance requirements and reduce equipment availability. The shortage of experienced operators, subsea engineers, software specialists and maintenance personnel can also restrict adoption. Defence export controls, cybersecurity requirements, local-content rules, environmental permitting and restrictions on seabed activities create additional barriers to cross-border sales and project execution.

Report Scope

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Underwater Robots 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,

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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 Robots market

Detailed Segmentation:

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 Robots Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Underwater Robots Market, Segmentation by Type:

ROV (Remotely Operated Vehicle)

AUV and Underwater Gliders

Hybrid AUV/ROV

Global Underwater Robots 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 Robots Market, Segmentation by Operational Capability:

Observation-Class

Inspection and Light-Work

Work-Class

Heavy-Work and Special-Purpose

Others

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Global Underwater Robots Market, Segmentation by Application:

Offshore Energy

Defence and Homeland Security

Science and Research

Underwater Infrastructure and Utilities

Aquaculture and Fisheries

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)

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Kystdesign

Argus Remote Systems

Shandong Future Robot

DWTEK

Ocean Modules Sweden

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

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Key Questions Answered:

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

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