

Global ROV and AUV Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global ROV and AUV market size is predicted to grow from US\$ 574 million in 2025 to US\$ 1674 million in 2032; it is expected to grow at a CAGR of 17.8% from 2026 to 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.

LPI (LP Information)' newest research report, the “ROV and AUV Industry Forecast” looks at past sales and reviews total world ROV and AUV sales in 2025, providing a comprehensive analysis by region and market sector of projected ROV and AUV sales for 2026 through 2032. With ROV and AUV sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world ROV and AUV industry.

This Insight Report provides a comprehensive analysis of the global ROV and AUV landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on ROV and AUV portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global ROV and AUV market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for ROV and AUV and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global ROV and AUV.

This report presents a comprehensive overview, market shares, and growth opportunities of ROV and AUV market by product type, application, key players and key regions and countries.

Segmentation by Type:

AUV

ROV

Glider

Buoy

Segmentation by Propulsion Mechanism:

Torpedo-Shaped

Box-Shaped

Flat/Wing-Shaped

Segmentation by Shape and Hydrodynamics:

Propeller-Driven

Buoyancy-Driven

Bionic/Bio-inspired

Segmentation by Application:

Civil Use

Military Use

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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.

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