

# **Unmanned Ground Vehicles Market by Mobility, Application (Military, Commercial, Law Enforcement, Federal Law Enforcement), Mode of Operation, Size, System, and Region (North America, Europe, APAC, Middle East and Rest of the World) - Forecast to 2027**

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## **Abstracts**

The unmanned ground vehicles market is estimated to be USD 2.7 billion in 2022 and is projected to reach USD 3.6 billion by 2027, at a CAGR of 5.7% from 2022 to 2027. Growth of this market can be attributed to the rise in military applications like combat support, ISR, mine clearance, etc., and commercial applications like firefighting, CBRN.

“Development of smart robots for combat operations”

Smart robots are an integral part of modern warfare, and, thus, different countries across the globe are increasing, including these robots in their defense forces. They are essential for combat operations and assist defense forces in various missions. Smart robots are designed to handle a broad range of combat tasks, from picking up snipers to carrying out target acquisitions. These robots can map a potentially large hostile area by accurately identifying and detecting different threats.

The defense forces of different countries focus on developing new robot technologies to enhance their combat capabilities. For instance, the Defense Advanced Research Projects Agency (DARPA) has been financing the development of a robotic submarine system since 2020 for use in several applications, right from detecting underwater mines to engaging in anti-submarine operations to protecting ships at harbors.

“Increased defense budgets of different countries for unmanned systems”

In the last 10 years, emerging economies such as India, China, and Singapore have increased their defense budgets. The US topped the list for military spending in 2021, followed by China, Saudi Arabia, and Russia. According to the Stockholm International Peace Research Institute (SIPRI), India was the third-largest country in terms of military spending in 2021. The UAE has increased its defense spending by 136% over the past 10 years, owing to its increasing GDP and unrest in the Middle East. In 2021, China increased its defense budget, which is predicted to increase in the coming years. These economies are increasingly investing in defense operations and are potential UGVs and related military robotics markets.

“Fully autonomous UGVs: The largest segment of the unmanned ground vehicles market, by Mode of operation.”

The fully autonomous operation does not have any human involvement or interference. The autonomous mode enables self sufficiency and can thus perform tasks and execute operations without human intervention. Advanced capabilities, such as secure communications and control, autonomous path following and obstacle avoidance, automatic target tracking, and data compression in UGVs are expected to aid the military in Reconnaissance, Surveillance, and Target Acquisition (RSTA) missions.

“Intelligence, Surveillance, & Reconnaissance (ISR): The fastest-growing segment of the unmanned ground vehicles market, by Military Application “

Intelligence, Surveillance, and Reconnaissance (ISR) is one of the major applications where military satellites are used. UAVs, UGVs, USVs, ROVs, AUVs, etc., are extensively used in ISR applications. Small UGVs are mainly utilized in the military sector to provide battlefield intelligence. Armed forces worldwide no longer rely on human scouts and instead use small robots, which can remain almost invisible to the enemy. These robots help monitor enemy forces or specific areas and send video images to the ground station with GPS assistance.

UGVs, such as the 510 PackBot developed by the iRobot Corporation/Endeavour Robotics (US), are widely used for ISR operations by the US military. The global naval forces use remotely Operated Vehicles (ROVs) for situational awareness and recognition of incoming threats through their remote sensing capabilities. ROVs use sensors, cameras, sonars, and echo sonar systems to collect complex data from their surroundings.

“North America: The largest contributing region in the unmanned ground vehicles

market.”

North America includes the US and Canada. The US is one of the largest global developers, operators, and exporters of unmanned military systems. Thus, it accounts for a large share of the North American region in the global unmanned ground vehicles market. The main functions of UGVs include ensuring border security, Intelligence, Surveillance & Reconnaissance (ISR), and minimizing the risks of terrorism on domestic assets and the population. North American countries are awarding several contracts to major players in the unmanned ground vehicles market to deliver UGVs with combat capabilities, thus driving the growth of the unmanned ground vehicles market in the region. For instance, the US has deployed several unmanned systems along the Mexican border to ensure that the gang-related violence and conflicts in Northern Mexico do not affect its internal security. Canada has also undertaken several measures to develop ground robotic vehicles for military functions.

### Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1–35%; Tier 2–45%; and Tier 3–20%

By Designation: CLevel–35%; Directors–25%; and Others–40%

By Region: North America–25%; Europe–15%; AsiaPacific–45%; Middle East–10%; and Rest of the World –5%

Raytheon Technologies Corporation (US), Thales Group (France), Northrop Grumman Corp. (US), L3harris Technologies (US), HEXAGON AB (Sweden), and Furuno Electric (Japan) are the key players in the unmanned ground vehicles market.

### Research Coverage

The study covers the unmanned ground vehicles market across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on Application, Mobility, Size, Mode of Operation, System, and region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product

and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

### Reasons to Buy this Report

This report is expected to help market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall unmanned ground vehicles market and its segments. This study is also expected to provide regionwise information about the end use, and wherein unmanned ground vehicles are used. This report aims at helping the stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses and plan suitable go-to-market strategies. This report is also expected to help them understand the pulse of the market and provide them with information on key drivers, restraints, challenges, and opportunities influencing the growth of the market.

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\*Details on Business overview, Products offered, Recent developments, MnM view, Key Strengths/Right to win, Strategic choices made, and Weakness and competitive threats might not be captured in case of unlisted companies.

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