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Autonomous Last Mile Delivery Market Forecasts to 2032 – Global Analysis By Component (Hardware, Software and Services), Range, Autonomy Level, End User and By Geography

https://marketpublishers.com/r/A2F1E62D25ECEN.html
Date: September 2025
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: A2F1E62D25ECEN

Abstracts

According to Stratistics MRC, the Global Autonomous Last Mile Delivery Market is accounted for $29.26 billion in 2025 and is expected to reach $140.33 billion by 2032 growing at a CAGR of 25.1% during the forecast period. Autonomous Last Mile Delivery refers to the use of advanced technologies such as self-driving vehicles, drones, and ground delivery robots to transport goods from distribution centers or local hubs directly to end customers without human intervention. It represents the final and most crucial stage of the supply chain, ensuring faster, cost-effective, and contactless deliveries. By leveraging artificial intelligence, sensors, and navigation systems, autonomous delivery enhances operational efficiency, reduces labor dependency, and improves customer satisfaction, particularly in e-commerce, food, and retail sectors facing high delivery demands.

Market Dynamics:

Driver:

Rapid growth of e-commerce & changing consumer expectations

Autonomous last mile systems are being deployed to meet rising expectations for same-day and scheduled deliveries across urban and suburban zones. Retailers and logistics providers are integrating autonomous vehicles, drones, and sidewalk robots to optimize delivery speed and reduce labor dependency. Real-time tracking, predictive routing, and digital interfaces are enhancing customer experience and operational transparency.

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Regulatory support for urban mobility and smart logistics is reinforcing deployment. These dynamics are positioning e-commerce and consumer behavior as primary drivers of autonomous last mile delivery adoption.

Restraint:

High initial cost & capital investment

Smaller logistics operators and retailers face challenges in scaling pilot programs and achieving ROI within constrained budgets. Integration with existing supply chains and IT systems adds complexity and cost. Maintenance, insurance, and cybersecurity provisions further increase operational overhead. Limited access to financing and uncertain payback timelines are slowing adoption among mid-tier players. These factors are tempering market expansion despite technological readiness.

Opportunity:

Government support, regulation & initiatives

Governments are funding pilot programs, offering tax incentives, and streamlining regulatory pathways for autonomous vehicle testing and deployment. Urban planning frameworks are being updated to accommodate delivery bots, curbside access, and micro-fulfillment centers. Collaboration between municipalities, tech firms, and logistics providers is accelerating innovation. Safety standards and data-sharing protocols are reinforcing trust and interoperability. These developments are enabling policy-led momentum across the autonomous delivery ecosystem.

Threat:

Public acceptance, trust & societal concerns

Incidents involving autonomous systems have heightened scrutiny and raised questions about safety, accountability, and job displacement. Retailers and logistics firms must invest in education, transparency, and inclusive deployment models to build trust. Media narratives and community engagement play a critical role in shaping public perception. Regulatory delays and ethical debates are complicating rollout strategies. These dynamics are introducing reputational and operational risk into autonomous delivery expansion.

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Covid-19 Impact:

The Covid-19 pandemic disrupted the Autonomous Last Mile Delivery market, causing temporary supply chain interruptions, production halts, and delays in raw material procurement. Retail, logistics, and consumer goods sectors, which are major end-users, experienced fluctuating demand, impacting deployment timelines. However, the increased focus on contactless delivery, healthcare logistics, and urban mobility partially offset the slowdown. Post-pandemic recovery is driven by growing demand for safe, efficient, and automated delivery systems, along with innovations in sustainable and high-performance autonomous platforms across industries.

The hardware segment is expected to be the largest during the forecast period

The hardware segment is expected to account for the largest market share during the forecast period owing to its central role in enabling autonomous navigation, sensing, and delivery execution. Components such as LiDAR, cameras, GPS modules, and robotic actuators are being integrated into ground vehicles, drones, and delivery bots. OEMs are focusing on scalable platforms with modular designs and enhanced durability. Investment in edge computing and onboard analytics is improving system responsiveness and reliability and thereby accelerating the market.

The healthcare providers & pharmacies segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the healthcare providers & pharmacies segment is predicted to witness the highest growth rate driven by demand for secure, timely, and contactless delivery of medical supplies, prescriptions, and diagnostic samples. Autonomous systems are being deployed to serve hospitals, clinics, and home care settings with minimal human interaction. Regulatory support for medical logistics and cold-chain compliance is reinforcing adoption. Integration with electronic health records and smart inventory systems is enhancing operational efficiency. This segment is emerging as a high-growth frontier for autonomous delivery innovation.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share due to its strong focus on logistics modernization, e-commerce penetration, and autonomous vehicle innovation. The U.S. and Canada are investing in smart infrastructure, urban mobility platforms, and regulatory frameworks for

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autonomous delivery. Retailers and logistics providers are scaling pilot programs across metropolitan areas and university campuses. Consumer demand for reliable, contactless delivery is influencing deployment strategies. OEMs and tech startups are leading in AI, sensor, and platform development.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR due to its robust e-commerce growth, dense urban environments, and government support for autonomous mobility. Countries like China, Japan, South Korea, and India are investing in smart transport infrastructure, EV integration, and last mile logistics innovation. Regional tech firms and logistics operators are leading in pilot deployments and scalable platform development. Public-private partnerships are reinforcing regulatory alignment and infrastructure readiness. Demand for efficient delivery across congested urban corridors is driving adoption.

Key players in the market

Some of the key players in Autonomous Last Mile Delivery Market include Starship Technologies, Nuro, Inc., Amazon.com, Inc., JD.com, Inc., Boxbot, Inc., Kiwibot, Refraction AI, Udelv, Inc., Robby Technologies, Eliport, FedEx Corporation, United Parcel Service, Inc. (UPS), Alibaba Group Holding Limited, Meituan and Yandex N.V.

Key Developments:

In March 2025, Starship Technologies partnered with foodora to launch autonomous robot delivery services in Stockholm, Sweden, marking its Nordic market entry. The collaboration supports sustainable urban logistics and expands Starship’s reach in European food delivery ecosystems.

In July 2024, Nuro acquired Ike Robotics, a specialist in autonomous trucking, marking its pivot beyond last-mile delivery. The acquisition expands Nuro’s capabilities into long-haul logistics, integrating Ike’s highway autonomy stack with Nuro’s urban delivery platform.

Components Covered:

- Hardware

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Software

Services

Ranges Covered:

Short-range (up to 5 km)

Mid-range (5–20 km)

Long-range (above 20 km)

Autonomy Levels Covered:

Remote-assisted autonomy

Semi-autonomy

Fully autonomy

End Users Covered:

Retailers & e-commerce platforms

Logistics & courier companies

Food delivery marketplaces & restaurants

Healthcare providers & pharmacies

Municipal & public services

Other End Users

Regions Covered:

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North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

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Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

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Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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