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Last-Mile Delivery Automation Market Forecasts to 2034 – Global Analysis By Component (Delivery Robots, Autonomous Delivery Vehicles, Route Optimization Software, Delivery Management Platforms and Other Components), Technology, Delivery Mode, Application, End User, and Geography

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Abstracts

According to Stratistics MRC, the Global Last-Mile Delivery Automation Market is accounted for $8.2 billion in 2026 and is expected to reach $37.0 billion by 2034 growing at a CAGR of 20.7% during the forecast period. Last-mile delivery automation involves the use of autonomous technologies and digital systems to streamline the final stage of product delivery from distribution centers to end customers. These solutions include delivery robots, autonomous vehicles, drones, AI-based route optimization software, and smart parcel lockers. Automated last-mile systems improve delivery speed, reduce transportation costs, and enhance operational efficiency while addressing rising e-commerce demand. They also help overcome urban logistics challenges such as traffic congestion and labor shortages. Increasing focus on fast and contactless delivery services is accelerating adoption of last-mile automation technologies worldwide.

Market Dynamics:

Driver:

Rapid e-commerce delivery growth

Consumers are increasingly expecting same-day and instant delivery services across

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urban markets. This is encouraging adoption of automated delivery systems to improve operational speed. Logistics companies are investing in robotics and autonomous systems to handle rising order volumes. Growth of online grocery and retail platforms is further strengthening demand. Increasing urbanization is adding pressure on delivery networks. These factors collectively support market growth.

Restraint:

Limited urban infrastructure readiness

Inadequate urban infrastructure remains a key restraint for last-mile delivery automation systems. Many cities lack dedicated lanes, docking zones, and digital connectivity required for autonomous delivery operations. Narrow roads and traffic congestion further limit system efficiency. Regulatory gaps in urban planning also slow deployment. Integration with existing logistics networks can be complex. Limited readiness of smart city infrastructure restricts large-scale adoption.

Opportunity:

Drone delivery technology expansion

Drones enable faster and contactless delivery of goods across urban and semi-urban regions. This is driving drone delivery technology expansion as logistics companies increasingly deploy autonomous aerial systems, AI-based navigation platforms, and real-time tracking solutions to enhance delivery efficiency and reduce operational delays across modern supply chain networks globally. Growing regulatory support for drone trials is further accelerating adoption. Continuous innovation in UAV technologies is expanding application scope. These developments are expected to strengthen market growth.

Threat:

Public safety liability concerns

Concerns regarding accidents, system malfunctions, and pedestrian safety may restrict large-scale adoption. Regulatory authorities may impose strict operational guidelines. Insurance and liability frameworks remain underdeveloped in many regions. Public acceptance of autonomous delivery technologies is still evolving. Safety-related incidents could negatively impact market perception. These factors act as a key market

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threat.

Covid-19 Impact:

The COVID-19 pandemic accelerated demand for contactless delivery solutions across e-commerce and food delivery sectors. Restrictions on movement increased reliance on automated and remote delivery systems. Logistics companies rapidly adopted robotics and autonomous technologies to ensure uninterrupted operations. Supply chain disruptions highlighted the need for efficient last-mile delivery models. Post-pandemic, demand for automation in logistics remained strong. Investment in smart delivery infrastructure increased significantly. Overall, the pandemic positively influenced market growth.

The delivery robots segment is expected to be the largest during the forecast period

The delivery robots segment is expected to account for the largest market share during the forecast period as ground-based autonomous delivery solutions suitable for short-distance urban logistics operations. Their ability to navigate sidewalks and controlled environments supports widespread adoption. Increasing demand for contactless delivery services further strengthens segment dominance. Integration with retail and food delivery platforms enhances usability. Cost-effective operation compared to drones supports large-scale deployment.

The food delivery service providers segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the food delivery service providers segment is predicted to witness the highest growth rate due to increasing integration of automation technologies into restaurant and cloud kitchen delivery ecosystems globally. This is driving food delivery service providers segment growth as companies increasingly deploy autonomous delivery robots, AI-based dispatch systems, and real-time logistics optimization platforms to enhance delivery speed and customer experience across urban food distribution networks. Rising demand for quick commerce services is further accelerating adoption.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share owing to strong adoption of automation technologies across the United

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States and Canada. The region has a mature delivery ecosystem supporting robotics and autonomous systems. Continuous investment in smart logistics further strengthens market expansion. Presence of leading technology providers supports innovation. Strong consumer demand for fast delivery services drives adoption.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR driven by increasing adoption of digital logistics solutions across countries such as China, India, Japan, South Korea, and Southeast Asia. Logistics companies are investing heavily in automation technologies. Rising demand for fast and affordable delivery services supports growth. Government initiatives promoting smart city development further accelerate adoption. Expanding online retail ecosystems strengthen market penetration.

Key players in the market

Some of the key players in Last-Mile Delivery Automation Market include Amazon.com Inc., Alphabet Inc., FedEx Corporation, United Parcel Service Inc., Starship Technologies Inc., Nuro Inc., Relay Robotics Inc., Ottonomy.IO, Matternet Inc., DJI Technology Co. Ltd., Zipline International Inc., TeleRetail GmbH, Kiwibot Inc., Serve Robotics Inc. and Cartken Inc.

Key Developments:

In May 2026, Alphabet Inc.’s drone delivery division, Wing, announced a massive strategic expansion of its national network to include 270 Walmart store locations across major hubs like Los Angeles and Miami. This logistics rollout follows the successful completion of over 750,000 small-package deliveries and integrates a unique "robot-to-drone" handoff system with Serve Robotics to automate the final leg of suburban deliveries for meals and household essentials.

In January 2026, Nuro, Inc. officially unveiled a global robotaxi partnership with Lucid and Uber at CES, showcasing its "Nuro Driver" universal autonomy platform integrated into customized Lucid electric vehicles. This corporate pivot transitions the company from a pure-play delivery hardware manufacturer into a licensing-driven autonomy provider, leveraging its $203 million Series E financing to pilot autonomous on-road ride-hailing services across major U.S. markets.

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Components Covered:

- Delivery Robots
- Autonomous Delivery Vehicles
- Route Optimization Software
- Delivery Management Platforms
- Other Components

Technologies Covered:

- Artificial Intelligence Technology
- Autonomous Navigation Technology
- Internet of Things Technology
- Computer Vision Technology
- Other Technologies

Delivery Modes Covered:

- Ground Delivery Automation Systems
- Aerial Delivery Automation Systems
- Sidewalk Delivery Automation Systems
- Locker-Based Delivery Automation Systems
- Other Delivery Modes

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Applications Covered:

- E-Commerce Delivery Applications
- Food Delivery Applications
- Healthcare Delivery Applications
- Retail Distribution Applications
- Other Applications

End Users Covered:

- E-Commerce Companies
- Logistics Service Providers
- Retail Chains
- Food Delivery Service Providers
- Other End Users

Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom

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- Germany
- France
- Italy
- Spain
- Netherlands
- Belgium
- Sweden
- Switzerland
- Poland
- Rest of Europe

Asia Pacific

- China
- Japan
- India
- South Korea
- Australia
- Indonesia
- Thailand
- Malaysia

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- Singapore
- Vietnam
- Rest of Asia Pacific

South America

- Brazil
- Argentina
- Colombia
- Chile
- Peru
- Rest of South America

Rest of the World (RoW)

- Middle East
  - Saudi Arabia
  - United Arab Emirates
  - Qatar
  - Israel
  - Rest of Middle East
- Africa
  - South Africa
  - Egypt

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Morocco

Rest of 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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- 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:

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 Rest of the World (RoW) are also represented in the same manner as above.

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