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Search and Rescue Robot Market Forecasts to 2034 – Global Analysis By Component (Hardware, Software, and Services), Robot Type, Operation Mode, Mobility Type, Deployment Environment, Application, End User, and By Geography

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Abstracts

According to Stratistics MRC, the Global Search and Rescue Robot Market is accounted for $2.2 billion in 2026 and is expected to reach $9.2 billion by 2034 growing at a CAGR of 19.2% during the forecast period. Search and rescue robots are specialized unmanned systems designed to assist first responders in locating, accessing, and extracting victims during emergencies such as natural disasters, building collapses, and wilderness incidents. These robots navigate challenging terrains, hazardous environments, and confined spaces that are unsafe for human personnel. The market encompasses diverse mobility platforms including wheeled, tracked, legged, flying, and swimming robots, each optimized for specific operational scenarios. Rising frequency of disasters, advancements in autonomy and increasing investments in public safety infrastructure are driving adoption across defense, civil defense, and commercial rescue organizations worldwide.

Market Dynamics:

Driver:

Increasing frequency and severity of natural disasters

Escalating climate-related events, including earthquakes, floods, wildfires, and hurricanes, have intensified the demand for rapid and effective emergency response capabilities. Search and rescue robots can be deployed into zones that are too

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dangerous for human teams, providing critical situational awareness and victim detection under hazardous conditions. Their ability to operate in unstable structures, smoke-filled environments, or floodwaters reduces response times and minimizes additional casualties among rescue personnel. Governments and disaster management agencies are increasingly allocating budgets for robotic assets as part of resilience planning, recognizing that traditional search methods often fall short in complex, large-scale emergencies.

Restraint:

High procurement and maintenance costs

The sophisticated technology integrated into search and rescue robots—including thermal imaging, gas sensors, high-bandwidth communication systems, and advanced mobility mechanisms—results in substantial upfront investment requirements. For many municipal fire departments and local emergency services, budget constraints limit the acquisition of these specialized systems. Additionally, ongoing expenses for spare parts, software updates, specialized training for operators, and periodic certification further strain operational budgets. Without dedicated funding mechanisms or shared resource models, cost remains a significant barrier to widespread adoption, particularly in smaller jurisdictions and developing nations where disaster risks may be equally high.

Opportunity:

Integration of artificial intelligence and autonomous navigation

Rapid advancements in AI are enabling search and rescue robots to operate with greater autonomy, reducing the need for continuous human control and improving mission efficiency. AI-driven perception systems can identify human forms, detect subtle movements, and differentiate victims from debris in real time. Autonomous navigation algorithms allow robots to map unknown environments, traverse complex terrains, and return to base without operator intervention. These capabilities are particularly valuable in scenarios with poor connectivity or when multiple robots must coordinate. As AI models become more robust and edge computing capabilities improve, the operational utility of these systems expands, opening new applications in both urban search and rescue and wide-area wilderness operations.

Threat:

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Operational limitations in extreme conditions

Despite technological progress, search and rescue robots still face significant performance constraints in the most demanding environments. Extreme temperatures can degrade battery efficiency and sensor accuracy, while heavy smoke, dust, or water submersion may impair vision and communication systems. Communication range and signal penetration through rubble or in underground settings remain persistent challenges, often forcing tethered operation that limits mobility. In fast-moving floodwaters or unstable debris, even advanced robots can become trapped or damaged. These limitations mean that robots currently complement rather than replace human responders, and failures during critical missions can erode trust and slow adoption among conservative emergency services.

Covid-19 Impact:

The COVID-19 pandemic temporarily disrupted supply chains for robotics components and delayed training programs for first responders. However, the crisis also highlighted the value of remote and contactless operations, accelerating interest in robots that could perform reconnaissance and victim assessment while minimizing personnel exposure to biological hazards. Decontamination capabilities became a new design consideration, and health authorities began exploring robots for pandemic response beyond traditional search and rescue. The heightened focus on operational resilience has led to sustained funding increases for robotics programs in public safety, creating a favorable post-pandemic environment for market expansion across both specialized rescue teams and broader emergency management agencies.

The Remotely Operated Robots segment is expected to be the largest during the forecast period

The Remotely Operated Robots segment is expected to account for the largest market share during the forecast period, driven by the proven reliability and precise control required in high-risk rescue scenarios. Remotely operated robots give human operators direct, real-time command over movement and payload functions, ensuring critical decisions remain under human supervision. This mode is preferred in complex environments such as collapsed structures, hazardous material incidents, and unstable terrain where autonomous systems may misinterpret conditions. Established procurement programs in defense and urban search and rescue units have long relied on tethered and radio-controlled platforms, creating a mature installed base. The trustworthiness and predictable performance of remotely operated systems continue to

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make them the go?to choice for mission?critical operations.

The Flying Robots segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Flying Robots segment is predicted to witness the highest growth rate, propelled by their unmatched ability to rapidly survey large areas, access aerial vantage points, and operate over obstacles that ground robots cannot navigate. Unmanned aerial vehicles (UAVs) equipped with thermal cameras, loudspeakers, and dropped payloads have become indispensable for wilderness searches, flood zone assessments, and post-disaster structural inspections. Their declining cost, improved flight endurance, and integration with swarm coordination algorithms make them increasingly accessible to fire departments, volunteer search teams, and disaster response organizations. As regulatory frameworks for beyond?visual?line?of?sight operations mature, flying robots will assume an even larger role in wide?area search missions.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by substantial government funding for homeland security, advanced defense research, and a strong ecosystem of robotics manufacturers. The United States has consistently invested in search and rescue robotics through agencies such as the Department of Homeland Security, NASA, and the Department of Defense, fostering continuous innovation. Widespread adoption by urban fire departments and federal disaster response teams, combined with a culture of technological integration in emergency services, ensures high market penetration. Additionally, the presence of major industry players and collaborative research centers drives ongoing product development, sustaining North America's leadership throughout the forecast period.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by increasing disaster vulnerability, rapid urbanization, and growing government investments in modern emergency response infrastructure. Countries such as Japan, China, and India face frequent earthquakes, typhoons, and floods, prompting national initiatives to deploy robotic systems for disaster management. Japan, with its long history of earthquake response innovation, leads in adopting legged and tracked rescue robots, while China is scaling up domestic production of UAVs for disaster

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surveillance. Expanding public?private partnerships and technology transfer agreements further accelerate deployment. As regional economies prioritize resilience, Asia Pacific emerges as the fastest?growing market for search and rescue robotics.

Key players in the market

Some of the key players in Search and Rescue Robot Market include Boston Dynamics Inc., Teledyne FLIR LLC, iRobot Corporation, Kongsberg Gruppen ASA, Northrop Grumman Corporation, Lockheed Martin Corporation, QinetiQ Group plc, ECA Group, Sarcos Technology and Robotics Corporation, Hydronalix Inc., L3Harris Technologies Inc., Thales Group, DJI, Parrot Drones SAS, and Elbit Systems Ltd.

Key Developments:

In March 2026, Sikorsky, a Lockheed Martin company, announced the successful flight testing and delivery of the U.S. Army's experimental UH-60MX Black Hawk, which now features the fully integrated MATRIX autonomy suite to enable autonomous search and rescue and cargo missions.

In January 2026, Exail Technologies (Formerly ECA Group) completed a €256 million fundraising initiative to accelerate the development of the DriX surface drones and next-generation autonomous underwater vehicles for hazardous environment navigation.

In June 2025, Parrot Drones SAS unveiled the ANAFI UKR range at the Paris Air Show, a family of micro-UAVs specifically designed for Search & Rescue in GNSS-denied environments (such as collapsed buildings and dense forests) using AI-based optical navigation.

Components Covered:

- Hardware
- Software
- Services

Robot Types Covered:

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- Ground-Based Robots
- Aerial Robots (UAVs/Drones)
- Marine Robots
- Hybrid/Multi-Terrain Robots

Operation Modes Covered:

- Remotely Operated Robots
- Autonomous Robots
- Semi-Autonomous Robots

Mobility Types Covered:

- Wheeled Robots
- Tracked Robots
- Legged Robots
- Flying Robots
- Swimming Robots

Deployment Environments Covered:

- Urban Environments
- Industrial & Infrastructure
- Marine & Offshore

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- Wilderness & Remote Areas
- Confined Spaces

Applications Covered:

- Urban Search & Rescue
- Disaster Response
- Firefighting Operations
- Military & Defense Missions
- Hazardous Material Handling
- Industrial Accident Response
- Mine & Tunnel Rescue
- Maritime Rescue

End Users Covered:

- Defense & Military
- Homeland Security
- Fire Departments
- Law Enforcement Agencies
- Disaster Management Agencies
- Industrial Sector
- Mining Sector

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Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom
  - Germany
  - France
  - Italy
  - Spain
  - Netherlands
  - Belgium
  - Sweden
  - Switzerland
  - Poland
  - Rest of Europe
- Asia Pacific
  - China

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- Japan
- India
- South Korea
- Australia
- Indonesia
- Thailand
- Malaysia
- Singapore
- Vietnam
- Rest of Asia Pacific

South America

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

Rest of the World (RoW)

- Middle East

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

Africa

- South Africa
- Egypt
- 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

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- 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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15.10 Hydronalix Inc.
15.11 L3Harris Technologies Inc.
15.12 Thales Group

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15.13 DJI
15.14 Parrot Drones SAS
15.15 Elbit Systems Ltd.

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