

Delivery Robots Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Load Carrying Capacity (Less than 10kg, 10-50kg, More than 50kg), By Component (Hardware (GPS (Global Positioning System), Camera, Radars, Ultrasonic/LiDAR (Light Detection and Ranging) Sensors, Control Systems, Chassis & Motors, Others), Software (Fleet Management, Computer Vision)), By Number of Wheels (3 Wheels, 4 Wheels, 6 Wheels), By Speed Limit (Upto 3 KPH, Higher than 3KPH upto 6 KPH, Higher than 6KPH), By Vertical (Food & Beverages, Retail, Healthcare, Others), By Region, Competition

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Abstracts

The estimated market size for the global delivery robots' sector is anticipated to achieve USD 926 million by the conclusion of 2023, demonstrating a compound annual growth rate (CAGR) of 26.12% over the forecast period. The global delivery robots' market is experiencing substantial transformation and expansion, driven by technological advancements reshaping the logistics of transporting and delivering goods across various industries. These autonomous robots, designed for independent navigation and item transportation between locations, are progressively finding integration in diverse sectors, including e-commerce, food delivery, healthcare, and logistics. The surge in online shopping, along with the demand for more efficient and convenient delivery solutions, has spurred the adoption of delivery robots as companies aim to streamline

their operations and meet evolving consumer expectations. Delivery robots come in various configurations, encompassing ground-based vehicles and aerial drones, each tailored to specific usage scenarios and environments. Ground-based robots navigate sidewalks, streets, and indoor spaces to transport packages to residences, offices, and public areas. They offer benefits such as reducing last-mile delivery expenses, alleviating traffic congestion, and expediting delivery times. Conversely, aerial drones possess the capability to overcome geographical obstacles and circumvent traffic congestion, rendering them suitable for remote or challenging-to-reach locations.

Key Market Drivers

The Exponential Growth of E-Commerce

The rapid and exponential growth of e-commerce has emerged as a driving force propelling the significant expansion of the global delivery robot's market. As online shopping becomes an increasingly integral part of consumers' lifestyles, the demand for efficient, reliable, and timely delivery services has skyrocketed. This surge in demand is prompting industries to seek innovative solutions that can effectively address the challenge of last-mile delivery—the final leg of the delivery journey to the customer's doorstep. This is where delivery robots come into play. These autonomous machines are adept at navigating urban environments, maneuvering through traffic, and delivering packages directly to customers, all while ensuring swift and seamless service.

Delivery robots offer a transformative solution to the complex logistics puzzle that e-commerce platforms face. By integrating these robots into their supply chains, companies can optimize delivery operations, minimize costs, and accelerate delivery times. The ability of delivery robots to operate autonomously, coupled with their adaptability to different environments and varying delivery demands, positions them as a viable and innovative option to meet the high expectations of modern consumers. They also address challenges related to labor shortages and the increasing pressure on traditional delivery methods.

As e-commerce continues its remarkable ascent, the synergy between its growth and the expansion of the delivery robots market becomes increasingly evident. This mutually beneficial relationship highlights the transformative potential of technological advancements in revolutionizing industries and meeting the evolving needs of today's consumers. The exponential growth of e-commerce is not only reshaping retail but also acting as a catalyst for innovation, pushing the boundaries of how goods are

transported and delivered in a digital age driven by convenience and efficiency.

Advancements in Robotics and (AI) Artificial Intelligence

The remarkable growth of the global delivery robots' market is being driven by substantial advancements in the fields of robotics and Artificial Intelligence (AI). These two intertwined technologies are propelling the development and deployment of highly capable and efficient delivery robots. The integration of sophisticated sensors, machine learning algorithms, and AI-powered decision-making processes has revolutionized the way these robots navigate through complex environments, interact with surroundings, and execute tasks autonomously.

Advancements in robotics have led to the creation of robots that can operate seamlessly in dynamic urban landscapes, identifying obstacles, pedestrians, and traffic signals with precision. This enables them to ensure safe and reliable navigation while adhering to traffic rules and avoiding potential hazards. Moreover, the integration of AI has enabled these robots to learn and adapt to changing scenarios in real-time. They can analyze data from various sources, anticipate traffic patterns, and make split-second decisions to optimize their routes for speed and efficiency. AI-driven improvements in perception, machine vision, and natural language processing have enabled robots to understand and respond to human interactions, making deliveries more interactive and customer-friendly. They can receive voice commands, provide real-time updates on delivery status, and ensure a seamless and engaging customer experience.

The convergence of advancements in robotics and AI has expanded the capabilities of delivery robots beyond mere transportation. They now have the potential to offer more comprehensive services, such as on-site identification, verification, and even basic customer support. As industries increasingly recognize the transformative potential of these technologies, the global delivery robots' market is witnessing substantial growth. Businesses are investing in research and development to create even more sophisticated robots that can handle diverse scenarios, contribute to efficient logistics, and reshape last-mile delivery processes across various sectors. The symbiotic relationship between robotics and AI, acting as catalysts for innovation, ensures that the growth of the delivery robots' market will continue to be driven by their ever-evolving capabilities and the multitude of benefits they bring to modern delivery operations.

The Rise of Urbanization

The rise of urbanization is a significant driver fueling the growth of the global delivery robot's market. As more people gravitate toward urban areas, the density of population and infrastructure presents unique challenges for efficient goods delivery. The congested streets, traffic congestion, and limited parking spaces in cities create a demand for innovative solutions to navigate these complexities. Delivery robots are emerging as a viable answer to this challenge, as they can seamlessly navigate through crowded urban environments, avoiding traffic and providing swift last-mile deliveries. Their ability to operate in tight spaces and offer contactless deliveries aligns with the demands of urban consumers and businesses. Thus, the rise of urbanization is not only contributing to the expansion of delivery services but also catalyzing the adoption of delivery robots as a practical and efficient solution for the evolving delivery landscape in cities worldwide.

The Emphasis on Sustainable Practices and Reducing the Carbon Footprint

The growing emphasis on sustainable practices and reducing the carbon footprint is playing a pivotal role in propelling the growth of the global delivery robot's market. As environmental concerns gain prominence, industries are seeking eco-friendly solutions to address their logistical operations. Delivery robots, often powered by electric sources, offer an emission-free and energy-efficient alternative to traditional delivery methods that rely on fossil fuel-powered vehicles. Their ability to contribute to cleaner air, reduce traffic congestion, and minimize noise pollution aligns with the goals of sustainability-conscious businesses and urban planners. As companies prioritize environmentally responsible practices, the integration of delivery robots becomes a strategic choice that not only enhances operational efficiency but also aligns with broader efforts to create greener, more sustainable urban environments.

Key Market Challenges

Limited Payload and Range of Delivery Robots

The global delivery robots' market is facing constraints in its growth trajectory due to the inherent limitations in payload capacity and operational range exhibited by these autonomous systems. While these robots excel in navigating complex urban environments and facilitating efficient last-mile deliveries, their ability to handle larger or bulkier packages is notably restricted. This limitation impacts their applicability across various industries with varying cargo sizes and demands. Furthermore, the constrained operational range, necessitating frequent recharging or refueling, can hinder their potential to cover extensive distances or operate seamlessly for extended durations. To

surmount these challenges, advancements in battery technology are imperative to extend the operational range and enhance the payload capacity of delivery robots. Overcoming these barriers is pivotal to fully unlock the capabilities of delivery robots, enabling them to cater effectively to diverse sectors and ultimately driving the broader adoption of autonomous delivery solutions on a global scale.

High Initial Costs of Delivery Robots

The growth of the global delivery robots' market is being hindered by the significant initial costs associated with the deployment of these advanced autonomous systems. While delivery robots offer transformative benefits to industries seeking to optimize their logistics operations, the substantial upfront investment required to design, develop, manufacture, and integrate these robots into existing supply chains can be a substantial barrier. The expense encompasses not only the hardware components but also the software, sensors, artificial intelligence technology, and safety features necessary to ensure reliable and efficient performance. This financial hurdle can deter businesses, particularly smaller players, from adopting delivery robots despite their potential long-term advantages. Mitigating this challenge requires ongoing research and innovation to drive down production costs, as well as exploring partnership opportunities that enable businesses to share the financial burden. By addressing the issue of high initial costs, the delivery robots market can pave the way for wider adoption, ensuring that the benefits of autonomous delivery solutions are accessible to a broader range of industries and stakeholders.

Key Market Trends

The Regulatory Framework Development

The ongoing development of a favorable regulatory framework is exerting a significant influence on propelling the growth of the global delivery robot's market. As the deployment of autonomous robots in public spaces raises legal and safety considerations, the establishment of clear and standardized regulations becomes pivotal. Governments and regulatory bodies are recognizing the potential of delivery robots to enhance efficiency and customer service while also ensuring public safety. By providing guidelines that address issues such as pedestrian interaction, liability, and operational parameters, regulatory bodies are instilling confidence in businesses to invest in and deploy delivery robots. This framework fosters an environment where innovation can flourish, encouraging companies to harness the benefits of these autonomous technologies, expand their services, and contribute to the reshaping of the

modern delivery landscape.

The Increasing Focus on Data-Driven Insights

The increasing focus on data-driven insights is a significant driving force propelling the growth of the global delivery robot's market. As delivery robots operate in real-world environments, they collect a wealth of data ranging from navigation patterns to customer interactions. Companies are recognizing the value of this data in optimizing their operations, enhancing route planning, and improving overall efficiency. By leveraging advanced analytics and machine learning, businesses can extract valuable insights from the data generated by delivery robots. These insights empower companies to make informed decisions, identify operational bottlenecks, and continuously refine their strategies. The emphasis on data-driven optimization not only enhances the performance of delivery robots but also ensures that these autonomous systems adapt and evolve, meeting the evolving demands of industries and consumers alike.

Segmental Insights

Number of Wheels Insights

Based on number of wheels, the 4 wheels assert itself as the predominant segment, showcasing unwavering dominance projected over the entire forecast period. This configuration strikes a balance between stability, maneuverability, and load-carrying capacity, making it a versatile choice for navigating diverse urban environments. The enduring prominence of the 4-wheel segment underscores its pivotal role in shaping the trajectory of the delivery robots' market, as it effectively caters to the evolving needs of industries seeking efficient and adaptable autonomous delivery solutions.

Vertical Insights

Based on vertical, the food & beverages segment emerges as a formidable frontrunner, exerting its dominance and shaping the market's trajectory throughout the forecast period. The prominence of food & beverages is attributed to the increasing demand for contactless and efficient food delivery solutions. This sector's adoption of delivery robots addresses the evolving preferences of consumers while optimizing delivery operations, positioning it as a driving force that significantly influences the direction of the delivery robots' market.

Regional Insights

North America emerges as a prominent and influential stronghold within the global delivery robots' market, propelled by a confluence of strategic factors that collectively underscore its pivotal role in shaping the industry's growth trajectory. The region's technologically advanced infrastructure, coupled with its dynamic ecosystem of tech innovators, startups, and established industry giants, creates a fertile ground for innovation and the rapid development of delivery robot technologies. Furthermore, North America's robust and evolving e-commerce landscape has given rise to heightened consumer expectations for seamless, efficient, and contactless delivery experiences, thus spurring demand for sophisticated autonomous delivery solutions.

Regulatory advancements that accommodate the safe integration of delivery robots into public spaces, roads, and sidewalks further solidify North America's foothold in the market. Additionally, the region's commitment to sustainable practices aligns seamlessly with the eco-friendly attributes of delivery robots, contributing to their rapid adoption. The substantial investments made by North American companies in research and development, alongside strategic partnerships with logistics providers and retailers, showcase the region's dedication to driving the industry's expansion. As North America leads the charge in adopting cutting-edge technologies and reshaping traditional delivery paradigms, its influence reverberates globally, setting benchmarks and inspiring trends in the broader realm of last-mile logistics. With its distinctive blend of innovation, consumer-driven demand, regulatory adaptability, and sustainability focus, North America's strategic position in the delivery robots market serves as a beacon, guiding the sector's growth and steering its transformative impact on the future of delivery services.

Key Market Players

Starship Technologies

Relay Robotics, Inc.

Ottonomy.IO

Nuro Inc.

Serve Robotics Inc.

JD.com, Inc.

TeleRetail (Aitonomi AG)

Aethon Inc.

Panasonic Holdings Corporation

Postmates Inc.

Report Scope:

In this report, the global delivery robots market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Delivery Robots Market, By Load Carrying Capacity:

Less than 10kg

10-50kg

More than 50kg

Global Delivery Robots Market, By Component:

Hardware

GPS (Global Positioning System)

Camera

Radars

Ultrasonic/LiDAR (Light Detection and Ranging) Sensors

Control Systems

Chassis & Motors

Others

Software

Fleet Management

Computer Vision

Global Delivery Robots Market, By Number of Wheels:

3 Wheels

4 Wheels

6 Wheels

Global Delivery Robots Market, By Speed Limit:

Upto 3 KPH

High than 3KPH upto 6 KPH

Higher than 6KPH

Global Delivery Robots Market, By Vertical:

Food & Beverages

Retail

Healthcare

Others

Global Delivery Robots Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Delivery Robots Market.

Available Customizations:

Global Delivery Robots market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

4. IMPACT OF COVID-19 ON GLOBAL DELIVERY ROBOTS MARKET

5. VOICE OF CUSTOMER

6. GLOBAL DELIVERY ROBOTS MARKET OVERVIEW

7. GLOBAL DELIVERY ROBOTS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Load Carrying Capacity (Less than 10kg, 10-50kg, More than 50kg)
 - 7.2.2. By Component (Hardware, Software)
 - 7.2.2.1. By Hardware (GPS (Global Positioning System), Camera, Radars, Ultrasonic/LiDAR (Light Detection and Ranging) Sensors, Control Systems, Chassis & Motors, Others)
 - 7.2.2.2. By Software (Fleet Management, Computer Vision)

- 7.2.3. By Number of Wheels (3 Wheels, 4 Wheels, 6 Wheels)
- 7.2.4. By Speed Limit (Upto 3 KPH, High than 3KPH upto 6 KPH, Higher than 6KPH)
- 7.2.5. By Vertical (Food & Beverages, Retail, Healthcare, Others)
- 7.2.6. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)
- 7.3. By Company (2022)
- 7.4. Market Map

8. NORTH AMERICA DELIVERY ROBOTS MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Load Carrying Capacity
 - 8.2.2. By Component
 - 8.2.2.1. By Hardware
 - 8.2.2.2. By Software
 - 8.2.3. By Number of Wheels
 - 8.2.4. By Vertical
- 8.3. North America: Country Analysis
 - 8.3.1. United States Delivery Robots Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Load Carrying Capacity
 - 8.3.1.2.2. By Component
 - 8.3.1.2.2.1. By Hardware
 - 8.3.1.2.2.2. By Software
 - 8.3.1.2.3. By Number of Wheels
 - 8.3.1.2.4. By Vertical
 - 8.3.2. Canada Delivery Robots Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Load Carrying Capacity
 - 8.3.2.2.2. By Component
 - 8.3.2.2.2.1. By Hardware
 - 8.3.2.2.2.2. By Software
 - 8.3.2.2.3. By Number of Wheels

- 8.3.2.2.4. By Vertical
- 8.3.3. Mexico Delivery Robots Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Load Carrying Capacity
 - 8.3.3.2.2. By Component
 - 8.3.3.2.2.1. By Hardware
 - 8.3.3.2.2.2. By Software
 - 8.3.3.2.3. By Number of Wheels
 - 8.3.3.2.4. By Vertical

9. EUROPE DELIVERY ROBOTS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Load Carrying Capacity
 - 9.2.2. By Component
 - 9.2.2.1. By Hardware
 - 9.2.2.2. By Software
 - 9.2.3. By Number of Wheels
 - 9.2.4. By Vertical
- 9.3. Europe: Country Analysis
 - 9.3.1. Germany Delivery Robots Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Load Carrying Capacity
 - 9.3.1.2.2. By Component
 - 9.3.1.2.2.1. By Hardware
 - 9.3.1.2.2.2. By Software
 - 9.3.1.2.3. By Number of Wheels
 - 9.3.1.2.4. By Vertical
 - 9.3.2. United Kingdom Delivery Robots Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Load Carrying Capacity

- 9.3.2.2.2. By Component
 - 9.3.2.2.2.1. By Hardware
 - 9.3.2.2.2.2. By Software
- 9.3.2.2.3. By Number of Wheels
- 9.3.2.2.4. By Vertical
- 9.3.3. France Delivery Robots Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Load Carrying Capacity
 - 9.3.3.2.2. By Component
 - 9.3.3.2.2.1. By Hardware
 - 9.3.3.2.2.2. By Software
 - 9.3.3.2.3. By Number of Wheels
 - 9.3.3.2.4. By Vertical
- 9.3.4. Spain Delivery Robots Market Outlook
 - 9.3.4.1. Market Size & Forecast
 - 9.3.4.1.1. By Value
 - 9.3.4.2. Market Share & Forecast
 - 9.3.4.2.1. By Load Carrying Capacity
 - 9.3.4.2.2. By Component
 - 9.3.4.2.2.1. By Hardware
 - 9.3.4.2.2.2. By Software
 - 9.3.4.2.3. By Number of Wheels
 - 9.3.4.2.4. By Vertical
- 9.3.5. Italy Delivery Robots Market Outlook
 - 9.3.5.1. Market Size & Forecast
 - 9.3.5.1.1. By Value
 - 9.3.5.2. Market Share & Forecast
 - 9.3.5.2.1. By Load Carrying Capacity
 - 9.3.5.2.2. By Component
 - 9.3.5.2.2.1. By Hardware
 - 9.3.5.2.2.2. By Software
 - 9.3.5.2.3. By Number of Wheels
 - 9.3.5.2.4. By Vertical

10. SOUTH AMERICA DELIVERY ROBOTS MARKET OUTLOOK

10.1. Market Size & Forecast

- 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Load Carrying Capacity
 - 10.2.2. By Component
 - 10.2.2.1. By Hardware
 - 10.2.2.2. By Software
 - 10.2.3. By Number of Wheels
 - 10.2.4. By Vertical
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Delivery Robots Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Load Carrying Capacity
 - 10.3.1.2.2. By Component
 - 10.3.1.2.2.1. By Hardware
 - 10.3.1.2.2.2. By Software
 - 10.3.1.2.3. By Number of Wheels
 - 10.3.1.2.4. By Vertical
 - 10.3.2. Argentina Delivery Robots Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Load Carrying Capacity
 - 10.3.2.2.2. By Component
 - 10.3.2.2.2.1. By Hardware
 - 10.3.2.2.2.2. By Software
 - 10.3.2.2.3. By Number of Wheels
 - 10.3.2.2.4. By Vertical
 - 10.3.3. Colombia Delivery Robots Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Load Carrying Capacity
 - 10.3.3.2.2. By Component
 - 10.3.3.2.2.1. By Hardware
 - 10.3.3.2.2.2. By Software
 - 10.3.3.2.3. By Number of Wheels
 - 10.3.3.2.4. By Vertical

11. MIDDLE EAST & AFRICA DELIVERY ROBOTS MARKET OUTLOOK

11.1. Market Size & Forecast

11.1.1. By Value

11.2. Market Share & Forecast

11.2.1. By Load Carrying Capacity

11.2.2. By Component

11.2.2.1. By Hardware

11.2.2.2. By Software

11.2.3. By Number of Wheels

11.2.4. By Vertical

11.3. Middle East & America: Country Analysis

11.3.1. Israel Delivery Robots Market Outlook

11.3.1.1. Market Size & Forecast

11.3.1.1.1. By Value

11.3.1.2. Market Share & Forecast

11.3.1.2.1. By Load Carrying Capacity

11.3.1.2.2. By Component

11.3.1.2.2.1. By Hardware

11.3.1.2.2.2. By Software

11.3.1.2.3. By Number of Wheels

11.3.1.2.4. By Vertical

11.3.2. Qatar Delivery Robots Market Outlook

11.3.2.1. Market Size & Forecast

11.3.2.1.1. By Value

11.3.2.2. Market Share & Forecast

11.3.2.2.1. By Load Carrying Capacity

11.3.2.2.2. By Component

11.3.2.2.2.1. By Hardware

11.3.2.2.2.2. By Software

11.3.2.2.3. By Number of Wheels

11.3.2.2.4. By Vertical

11.3.3. UAE Delivery Robots Market Outlook

11.3.3.1. Market Size & Forecast

11.3.3.1.1. By Value

11.3.3.2. Market Share & Forecast

11.3.3.2.1. By Load Carrying Capacity

11.3.3.2.2. By Component

- 11.3.3.2.2.1. By Hardware
- 11.3.3.2.2.2. By Software
- 11.3.3.2.3. By Number of Wheels
- 11.3.3.2.4. By Vertical
- 11.3.4. Saudi Arabia Delivery Robots Market Outlook
 - 11.3.4.1. Market Size & Forecast
 - 11.3.4.1.1. By Value
 - 11.3.4.2. Market Share & Forecast
 - 11.3.4.2.1. By Load Carrying Capacity
 - 11.3.4.2.2. By Component
 - 11.3.4.2.2.1. By Hardware
 - 11.3.4.2.2.2. By Software
 - 11.3.4.2.3. By Number of Wheels
 - 11.3.4.2.4. By Vertical

12. ASIA PACIFIC DELIVERY ROBOTS MARKET OUTLOOK

- 12.1. Market Size & Forecast
 - 12.1.1. By Value
- 12.2. Market Share & Forecast
 - 12.2.1. By Load Carrying Capacity
 - 12.2.2. By Component
 - 12.2.2.1. By Hardware
 - 12.2.2.2. By Software
 - 12.2.3. By Number of Wheels
 - 12.2.4. By Vertical
- 12.3. Asia Pacific: Country Analysis
 - 12.3.1. China Delivery Robots Market Outlook
 - 12.3.1.1. Market Size & Forecast
 - 12.3.1.1.1. By Value
 - 12.3.1.2. Market Share & Forecast
 - 12.3.1.2.1. By Load Carrying Capacity
 - 12.3.1.2.2. By Component
 - 12.3.1.2.2.1. By Hardware
 - 12.3.1.2.2.2. By Software
 - 12.3.1.2.3. By Number of Wheels
 - 12.3.1.2.4. By Vertical
 - 12.3.2. Japan Delivery Robots Market Outlook
 - 12.3.2.1. Market Size & Forecast

- 12.3.2.1.1. By Value
- 12.3.2.2. Market Share & Forecast
 - 12.3.2.2.1. By Load Carrying Capacity
 - 12.3.2.2.2. By Component
 - 12.3.2.2.2.1. By Hardware
 - 12.3.2.2.2.2. By Software
 - 12.3.2.2.3. By Number of Wheels
 - 12.3.2.2.4. By Vertical
- 12.3.3. South Korea Delivery Robots Market Outlook
 - 12.3.3.1. Market Size & Forecast
 - 12.3.3.1.1. By Value
 - 12.3.3.2. Market Share & Forecast
 - 12.3.3.2.1. By Load Carrying Capacity
 - 12.3.3.2.2. By Component
 - 12.3.3.2.2.1. By Hardware
 - 12.3.3.2.2.2. By Software
 - 12.3.3.2.3. By Number of Wheels
 - 12.3.3.2.4. By Vertical
- 12.3.4. India Delivery Robots Market Outlook
 - 12.3.4.1. Market Size & Forecast
 - 12.3.4.1.1. By Value
 - 12.3.4.2. Market Share & Forecast
 - 12.3.4.2.1. By Load Carrying Capacity
 - 12.3.4.2.2. By Component
 - 12.3.4.2.2.1. By Hardware
 - 12.3.4.2.2.2. By Software
 - 12.3.4.2.3. By Number of Wheels
 - 12.3.4.2.4. By Vertical
- 12.3.5. Australia Delivery Robots Market Outlook
 - 12.3.5.1. Market Size & Forecast
 - 12.3.5.1.1. By Value
 - 12.3.5.2. Market Share & Forecast
 - 12.3.5.2.1. By Load Carrying Capacity
 - 12.3.5.2.2. By Component
 - 12.3.5.2.2.1. By Hardware
 - 12.3.5.2.2.2. By Software
 - 12.3.5.2.3. By Number of Wheels
 - 12.3.5.2.4. By Vertical
- 12.3.6. Singapore Delivery Robots Market Outlook

- 12.3.6.1. Market Size & Forecast
 - 12.3.6.1.1. By Value
- 12.3.6.2. Market Share & Forecast
 - 12.3.6.2.1. By Load Carrying Capacity
 - 12.3.6.2.2. By Component
 - 12.3.6.2.2.1. By Hardware
 - 12.3.6.2.2.2. By Software
 - 12.3.6.2.3. By Number of Wheels
 - 12.3.6.2.4. By Vertical

13. MARKET DYNAMICS

- 13.1. Drivers
- 13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

- 15.1. Starship Technologies
 - 15.1.1. Business Overview
 - 15.1.2. Key Financials & Revenue
 - 15.1.3. Key Contact Person
 - 15.1.4. Headquarters Address
 - 15.1.5. Key Product/Service Offered
- 15.2. Relay Robotics, Inc.
 - 15.2.1. Business Overview
 - 15.2.2. Key Financials & Revenue
 - 15.2.3. Key Contact Person
 - 15.2.4. Headquarters Address
 - 15.2.5. Key Product/Service Offered
- 15.3. Ottonomy.IO
 - 15.3.1. Business Overview
 - 15.3.2. Key Financials & Revenue
 - 15.3.3. Key Contact Person
 - 15.3.4. Headquarters Address
 - 15.3.5. Key Product/Service Offered
- 15.4. Nuro Inc.
 - 15.4.1. Business Overview

- 15.4.2. Key Financials & Revenue
- 15.4.3. Key Contact Person
- 15.4.4. Headquarters Address
- 15.4.5. Key Product/Service Offered
- 15.5. Serve Robotics Inc.
 - 15.5.1. Business Overview
 - 15.5.2. Key Financials & Revenue
 - 15.5.3. Key Contact Person
 - 15.5.4. Headquarters Address
 - 15.5.5. Key Product/Service Offered
- 15.6. JD.com, Inc.
 - 15.6.1. Business Overview
 - 15.6.2. Key Financials & Revenue
 - 15.6.3. Key Contact Person
 - 15.6.4. Headquarters Address
 - 15.6.5. Key Product/Service Offered
- 15.7. TeleRetail (Aitonomi AG)
 - 15.7.1. Business Overview
 - 15.7.2. Key Financials & Revenue
 - 15.7.3. Key Contact Person
 - 15.7.4. Headquarters Address
 - 15.7.5. Key Product/Service Offered
- 15.8. Aethon Inc.
 - 15.8.1. Business Overview
 - 15.8.2. Key Financials & Revenue
 - 15.8.3. Key Contact Person
 - 15.8.4. Headquarters Address
 - 15.8.5. Key Product/Service Offered
- 15.9. Panasonic Holdings Corporation
 - 15.9.1. Business Overview
 - 15.9.2. Key Financials & Revenue
 - 15.9.3. Key Contact Person
 - 15.9.4. Headquarters Address
 - 15.9.5. Key Product/Service Offered
- 15.10. Postmates Inc.
 - 15.10.1. Business Overview
 - 15.10.2. Key Financials & Revenue
 - 15.10.3. Key Contact Person
 - 15.10.4. Headquarters Address

15.10.5. Key Product/Service Offered

16. STRATEGIC RECOMMENDATIONS

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