

Unmanned Ground Vehicles Market - Global Industry Size, Share, Trends Opportunity, and Forecast, Segmented By Application Type (Military, Commercial), By Mobility Type (Wheeled, Tracked, Legged, Hybrid), By Size Type (Small, Medium, Large, Very Large), By Region & Competition, 2021-2031F

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Abstracts

The Global Unmanned Ground Vehicles Market is projected to expand from USD 3.46 Billion in 2025 to USD 5.47 Billion by 2031, registering a CAGR of 7.93%. These mechanized platforms, designed to operate on surface terrain without an onboard human via remote or autonomous control, are seeing increased uptake due to safety and efficiency needs. Key growth factors include the urgent requirement to limit human risk in hazardous defense and industrial settings, alongside a growing necessity for labor automation and operational streamlining in supply chains. These drivers motivate diverse industries to adopt automation for dangerous or repetitive workflows, establishing a trend rooted in long-term utility rather than temporary novelty.

However, the lack of standardized regulatory frameworks for autonomous navigation in public spaces remains a major barrier to broader commercialization. Liability risks and strict safety protocols continue to hinder full-scale deployment in unstructured environments. Despite these challenges, the scale of adoption is significant; according to the International Federation of Robotics, sales of professional service robots for transportation and logistics reached 102,900 units in 2024, highlighting significant market activity even amidst these regulatory hurdles.

Market Driver

The acceleration of global defense modernization is fundamentally reshaping the market as nations transition from experimental prototypes to large-scale acquisition programs for unmanned systems. Defense agencies are prioritizing cost-effective, scalable platforms capable of operating as robotic wingmen or in swarms to improve soldier survivability and operational reach. For instance, Breaking Defense reported in August 2025 that the U.S. Army issued a request for information regarding ground robots priced under \$650,000 per unit to equip Armored Brigade Combat Teams.

Simultaneously, the commercial sector is expanding due to the demand for logistics and last-mile delivery automation aimed at reducing costs and mitigating labor shortages. Retailers are rapidly deploying autonomous fleets to enable contactless, efficient urban delivery independent of human shifts. This trend is evidenced by Serve Robotics achieving its goal of deploying over 2,000 robots in the U.S. by December 2025, and by Association for Advancing Automation data showing North American companies ordered 17,635 robots valued at over \$1 billion in the first half of 2025.

Market Challenge

The absence of universally standardized regulatory frameworks for autonomous navigation in public spaces serves as a critical bottleneck for the Unmanned Ground Vehicle market. Without cohesive laws governing interactions with pedestrians and traffic, manufacturers navigate a fragmented legal landscape fraught with liability risks, often forcing them to limit operations to private environments like warehouses. This regulatory uncertainty leads potential adopters to delay investment, as securing comprehensive insurance and guaranteeing long-term compliance remain difficult.

This hesitation creates a tangible drag on market momentum, resulting in stabilized demand rather than the explosive growth expected from technological capabilities alone. Recent data reflects this impact; according to the Association for Advancing Automation, North American robot orders totaled 31,311 units in 2024, a marginal 0.5% increase from the previous year. This plateau underscores how regulatory and safety-related impediments directly restrict broader commercial scalability and dampen overall market expansion.

Market Trends

The integration of Artificial Intelligence and Machine Learning is advancing Unmanned Ground Vehicles from tele-operated devices to fully independent systems capable of navigating unstructured and GPS-denied environments. This technology allows onboard

processors to dynamically perceive obstacles and replan routes, significantly reducing the cognitive burden on operators during complex missions. Operational validation of this capability is increasing, as seen in June 2025 when Overland AI successfully deployed its ULTRA autonomous systems in 15 live missions to execute objectives independently of human controllers.

Concurrently, the rise of Robots-as-a-Service (RaaS) business models is democratizing access to robotics by shifting procurement from capital-intensive acquisitions to flexible operational expenditures. This model allows enterprises to scale fleets based on demand while transferring maintenance and obsolescence risks to providers. The International Federation of Robotics reported in October 2025 that the RaaS segment grew by 42% in 2024, indicating a decisive market shift toward pay-per-use automation solutions.

Key Market Players

Teledyne FLIR LLC

General Dynamics Corporation

Rheinmetall AG

QinetiQ Limited

Oshkosh Corporation

Groupe ECA

AeroVironment Inc.

Horiba Mira Ltd

Milrem AS

Textron Inc

Report Scope

In this report, the Global Unmanned Ground Vehicles Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Unmanned Ground Vehicles Market, By Application Type

Military

Commercial

Unmanned Ground Vehicles Market, By Mobility Type

Wheeled

Tracked

Legged

Hybrid

Unmanned Ground Vehicles Market, By Size Type

Small

Medium

Large

Very Large

Unmanned Ground Vehicles Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Unmanned Ground Vehicles Market.

Available Customizations:

Global Unmanned Ground Vehicles Market report with the given market data, TechSci 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).

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