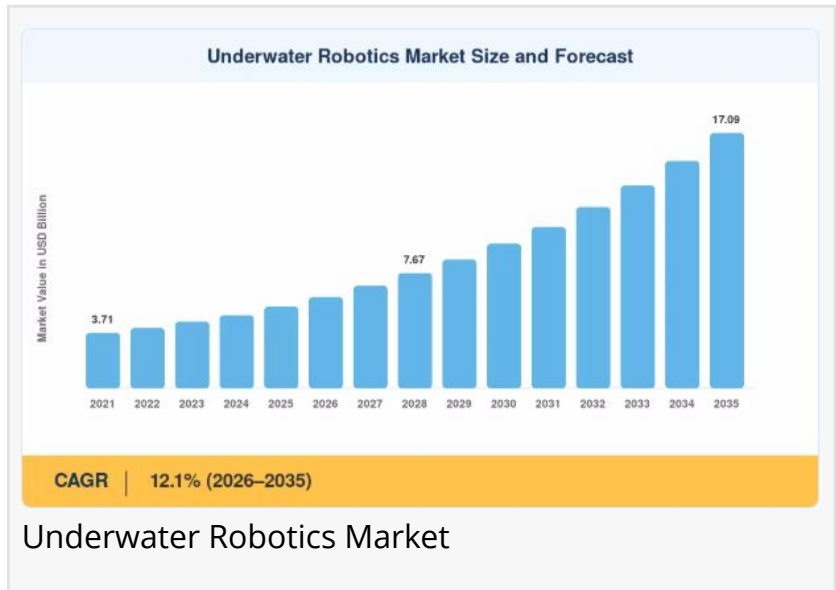


# Underwater Robotics Market Worth USD 17.09 Billion by 2035, Growing at 12.1% CAGR

*Underwater Robotics Market Size, Share and Research Report By Type (Remotely Operated Vehicles (ROV) and Autonomous Underwater Vehicles (AUV))*

NEW YORK,, NY, UNITED STATES, August 13, 2026 /EINPresswire.com/ -- The Global [Underwater Robotics market](#) was estimated at USD 3.6 billion in 2024 and is projected to grow from USD 4.22 billion in 2025 to USD 20.63 billion by 2035, exhibiting a compound annual growth rate of 17.2% during the forecast period 2025–2035. This trajectory is anchored in accelerating technological advancements, particularly the integration of artificial intelligence and machine learning into underwater vehicles, which is enhancing operational efficiency and autonomy and allowing more complex tasks to be performed with minimal human intervention.



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Underwater Robotics Market: Underwater robotics enables advanced exploration, inspection, maintenance, and monitoring across marine and offshore environments.”  
*Market Research Future (MRFR)*

This evolution is particularly evident in industries such as marine research, oil and gas exploration, and underwater construction, where demand for precise and reliable robotic systems is on the rise. The market's momentum reflects the convergence of growing demand for marine exploration, rising defense and security applications, advancements in sensor technology, and increased focus on environmental monitoring accelerating across the world's leading maritime and defense-technology economies simultaneously.

Governments are increasingly funding research initiatives aimed at exploring oceanic depths and understanding marine ecosystems, fostering collaboration between academic institutions and commercial entities and spurring innovation across the industry. Remotely Operated Vehicles currently hold the largest market share, driven by robust applications in oil and gas, marine

research, and underwater inspection, while [Autonomous Underwater Vehicles](#) are rapidly gaining traction due to advanced autonomous navigation and data-collection capabilities that require no direct human control.

North America is the largest market for underwater robotics, holding approximately 45% of the global share, driven by increasing investments in marine research, oil and gas exploration, and defense applications. Europe accounts for approximately 30% of the global share, fueled by underwater exploration, environmental monitoring, and offshore energy projects, while Asia-Pacific is emerging as a significant player holding around 20% of the global share as China and Japan lead regional investment in marine technology.

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### □ How Significant Is the Underwater Robotics Market's Growth?

The underwater robotics market's trajectory from USD 4.22 billion in 2025 to a projected USD 20.63 billion by 2035 represents nearly a five-fold expansion over the forecast decade, reflecting the structural shift from tethered, human-operated vehicles toward AI-enhanced, increasingly autonomous underwater systems deployed across defense, energy, and scientific research. The market's 17.2% CAGR is anchored in a technology-and-investment super cycle where artificial intelligence integration, growing public and private research funding, and rising defense procurement are all converging to make underwater robotics indispensable infrastructure for ocean exploration, offshore energy, and maritime security.

Remotely Operated Vehicles hold the largest share of the market, with revenue projected to reach USD 8.25 billion by 2035, propelled by extensive use in offshore oil and gas exploration, underwater construction, and marine science, while Autonomous Underwater Vehicles are the fastest-growing type, with revenue projected to reach USD 12.38 billion by 2035 as long-duration, independently operating missions gain favor among research institutions and environmental monitoring agencies.

By category, the Lightweight and Man Portable segment dominates due to increased adoption in recreational, research, and military applications, while the Heavy-Weight segment is projected to generate USD 6.12 billion by 2035 as demand rises for deep-sea exploration and complex underwater tasks. By application, Inspection is the largest segment, expected to generate USD 4.0 billion by 2035 through underwater infrastructure and pipeline monitoring, while Environmental Assessment is the fastest-growing application, projected to reach USD 2.8 billion by 2035 amid intensifying environmental regulations.

### □ What Does the Future Hold for the Underwater Robotics Market?

Growing demand for marine exploration is a pivotal driver of the underwater robotics market, as

nations and organizations increasingly seek to understand oceanic ecosystems. These technologies facilitate deep-sea research, enabling scientists to gather data on marine biodiversity and geological formations, with the marine-exploration segment of demand projected to grow at approximately 15% annually over the next five years. The integration of artificial intelligence in underwater robotics further enhances data collection and analysis, making these systems more efficient and effective, and this growing demand is likely to propel the market to new heights as stakeholders invest in innovative solutions to address the challenges of underwater research.

Rising applications in defense and security are significantly influencing the underwater robotics market, as military organizations increasingly adopt unmanned underwater vehicles for surveillance, reconnaissance, and mine detection operations. Global defense expenditure has seen a steady increase, with many countries allocating substantial budgets for advanced technologies including underwater robotics, and the Defense & Security end-user segment is anticipated to generate USD 5.92 billion by 2035.

Advancements in sensor technology add further momentum, as innovations in sonar, imaging, and environmental sensors enable underwater robots to operate more effectively in challenging conditions; high-resolution imaging sensors allow detailed mapping of underwater terrains while advanced sonar systems improve navigation and obstacle detection, with the underwater sensor market itself expected to grow by over 20% in the coming years.

Emerging opportunities in commercial applications are also reshaping the market's trajectory, as industries including oil and gas, aquaculture, and underwater construction increasingly utilize underwater robotics for inspection, maintenance, and data collection, with the commercial segment projected to witness a growth rate of around 12% in the coming years.

Looking further ahead, new opportunities lie in the development of autonomous underwater vehicles for deep-sea mining operations, the integration of AI for real-time data analysis in underwater inspections, and the expansion of underwater robotics into the renewable energy sector for offshore wind farm maintenance. By 2035, the underwater robotics market is expected to be robust, driven by continued innovation and diversification of applications across defense, commercial, and scientific domains.

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#### □ Who Are the Key Players in the Underwater Robotics Market?

The underwater robotics market is moderately fragmented, with key players strategically positioned to leverage innovation and partnerships to enhance their market presence. Companies are increasingly localizing manufacturing to reduce costs and optimize supply chains, a tactic that is crucial in a sector where operational efficiency significantly impacts profitability.

The shift from price-based competition toward technological differentiation and supply chain reliability is evident, suggesting future competitive strategies will hinge on the ability to innovate and adapt to evolving market demands. MRFR identifies the following key participants shaping the market:

□ Ocean Infinity (GB) - focuses on autonomous underwater vehicles for data collection, having announced a partnership with a leading environmental organization in August 2025 to deploy its AUVs for marine conservation efforts, reinforcing its position as a sustainability-focused market leader.

□ Teledyne Technologies (US) - emphasizes a broad portfolio of underwater sensors and robotics, having unveiled a new line of underwater drones designed for deep-sea exploration in September 2025, positioning the company at the forefront of technological advancement in the sector.

□ Kongsberg Gruppen (NO) - is enhancing its capabilities through digital transformation initiatives, having expanded its operations in Asia by establishing a new manufacturing facility in Singapore in July 2025 to serve growing regional demand.

□ Saab AB (SE) - a defense-technology conglomerate providing underwater systems for naval and security applications, leveraging its broader defense-electronics portfolio to serve maritime surveillance and anti-submarine warfare customers.

□ Fugro (NL) - a global geo-data specialist providing survey-class ROVs and AUVs for offshore energy and infrastructure inspection, expanding operations to serve growing Asia-Pacific demand for marine technology.

□ Bluefin Robotics (US) - a specialist in autonomous underwater vehicles for defense and commercial survey applications, expanding operations to cater to growing regional demand across Asia-Pacific markets.

□ ECA Group / Groupe Gorgé (FR) - a mine-countermeasure and defense robotics specialist providing the K-STER underwater robot, having supplied the Lithuanian Navy with an efficient ROV solution for sea mine countermeasures.

□ Subsea 7 (GB) - an offshore energy services provider offering robotics-enabled subsea inspection, repair, and maintenance solutions, making strides in the Middle East and Africa with innovative solutions tailored to local needs.

□ DeepOcean (NO) - an offshore subsea services specialist that tested its first Autonomous Inspection Drone for offshore wind farms and oil and gas assets in April 2023, installed aboard its IMR-ROV support vessel Edda Fauna.

□ Forum Energy Technologies (US) - a subsea equipment manufacturer that delivered three Perry XLX-C work-class ROVs of 200HP each to Brazilian firm OceanPact in January 2023, manufactured at its Kirkbymoorside, UK facility to support Petrobras oilfield operations.

Strategic competition in the underwater robotics market is increasingly defined by digitalization, sustainability, and the integration of artificial intelligence, with strategic alliances among key players shaping the competitive landscape and fostering innovation. Governments across the globe continue investing in this technology for advanced military applications including intelligence gathering, surveillance, mine hunting, oceanology services, and anti-submarine warfare, with programs such as DARPA's contract with BAE Systems to develop an Unmanned Underwater Vehicle capable of complementing manned submarines illustrating the scale of defense-driven demand shaping vendor strategy.

### □ What Are the Emerging Trends in the Underwater Robotics Market?

Several transformational trends are redefining the underwater robotics market's evolution through 2035:

**Technological Advancements:** Rapid progress in artificial intelligence and machine learning is enhancing the capabilities of underwater vehicles, enabling them to perform complex tasks autonomously and efficiently, particularly evident in North America where innovation is concentrated.

**Increased Investment:** A noticeable rise in investments from both governmental and private sectors is aimed at advancing underwater robotics, driving research and development and fostering collaboration between various stakeholders across the industry.

**Environmental Applications:** Focus on environmental monitoring and conservation is becoming increasingly prominent, with robotic systems utilized for data collection and habitat assessment to support sustainable practices and marine ecosystem preservation.

**Advancements in Sensor Technology:** Innovations in sonar, imaging, and environmental sensors are enabling underwater robots to operate more effectively in challenging conditions, with the underwater sensor market expected to grow by over 20% in coming years.

**Deep-Sea Mining and Renewable Energy Applications:** Development of autonomous underwater vehicles for deep-sea mining operations and expansion of underwater robotics into offshore wind farm maintenance represent significant new opportunity areas as the renewable energy sector matures.

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## □ How Is the Underwater Robotics Market Segmented?

The underwater robotics market report provides a comprehensive segmentation framework:

By Type: Remotely Operated Vehicles — ROV (USD 8.25 billion by 2035), Autonomous Underwater Vehicles — AUV (USD 12.38 billion by 2035)

By Category: Lightweight / Man Portable (largest segment), Heavy-Weight (USD 6.12 billion by 2035), Extra Large

By Application: Search and Salvage, Archaeology and Exploration, Survey, Inspection (USD 4.0 billion by 2035), Security, Surveillance, Environmental Assessment (USD 2.8 billion by 2035), Others

By Depth Capacity: Less than 1000 Mts (largest segment), 1000 Mts to 5000 Mts (fastest-growing), More than 5000 Mts

By End User: Commercial Exploration (largest segment), Defense & Security (USD 5.92 billion by 2035), Scientific & Academic Research

By Region: North America (~45% share), Europe (~30% share), Asia-Pacific (~20% share), Middle East & Africa (~5% share)

## □ What Are the Regional Insights from the Underwater Robotics Market?

North America is the largest market for underwater robotics, holding approximately 45% of the global share, with growth driven by increasing investments in marine research, oil and gas exploration, and defense applications. Regulatory support from agencies like the National Oceanic and Atmospheric Administration further catalyzes demand for advanced underwater technologies.

The United States and Canada are the primary contributors to this market, with a strong focus on innovation and sustainability, and the competitive landscape is robust, featuring key players such as Teledyne Technologies and Ocean Infinity at the forefront of technological advancement, alongside a growing number of startups fostering a dynamic environment for research and development.

Europe is witnessing significant growth in the underwater robotics market, accounting for approximately 30% of the global share, with expansion fueled by increasing demand for underwater exploration, environmental monitoring, and offshore energy projects. Regulatory frameworks such as the European Marine Strategy Framework Directive promote sustainable practices and innovation in marine technologies, driving market growth.

Norway and the UK are the largest markets, leveraging their extensive coastlines and maritime industries, with leading countries also including France, and companies like Kongsberg Gruppen and ECA Group leading the charge through advanced robotics and AI integration alongside collaborative initiatives between academia and industry.

Asia-Pacific is emerging as a significant player in the underwater robotics market, holding around 20% of the global share, with growth driven by increasing investments in marine research, aquaculture, and offshore oil and gas exploration. China and Japan are leading the charge, supported by government initiatives aimed at enhancing technological capabilities in marine environments, with demand for underwater robotics expected to rise as industries seek to improve efficiency and safety in underwater operations.

The competitive landscape features a strong presence of local manufacturers and international players including Fugro and Bluefin Robotics, both of which are expanding operations to cater to growing regional demand.

The Middle East and Africa region is gradually emerging in the underwater robotics market, currently holding about 5% of the global share, with growth primarily driven by the oil and gas sector's increasing adoption of advanced technologies for underwater exploration and maintenance. The UAE and South Africa are leading the market, supported by government initiatives aimed at enhancing marine capabilities, and the region's potential is further bolstered by investments in research and development focusing on sustainable practices.

Key players such as Subsea 7 and DeepOcean are making strides in the market, offering innovative solutions tailored to local needs, while the presence of international firms collaborating with local companies continues to enhance technological capabilities as the region positions itself as a future hub for underwater technology.

□□□Regional & Country-Level Reports by Market Research Future:

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