Asia-Pacific AUV and ROV - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 110 pages | Mordor Intelligence

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Report description:

The Asia-Pacific AUV and ROV Market is expected to register a CAGR of greater than 5.65% during the forecast period.

COVID-19 negatively impacted the market in 2020. Presently, the market has reached the pre-pandemic level.

Key Highlights
- Over the long term, the major driving factors of the market are increasing offshore oil and gas exploration activities along with growing offshore wind energy installations.
- On the flip side, increasing environmental damage due to the increasing use of fossil fuels has led to the banning of offshore oil and gas exploration in the Asia-Pacific region. This is expected to slow down the market during the forecast period.
- Nevertheless, technological advancements in the AUV and ROV market are expected to create enormous opportunities for the Asia-Pacific region soon.
- China is expected to dominate the market during the forecast period, as it has heavily invested in its defense sector and the R&D of AUVs and ROVs.

APAC AUV & ROV Market Trends

ROV Vehicle Type Expected to Witness Significant Growth

- Remotely-operated underwater vehicles (ROVs) are robots that complete functions underwater on behalf of a crew on the surface, with whom the ROV is tethered. Some of the significant functions of ROV include equipment repair, scientific analysis, dredging/trenching, cable-laying, diver observation, platform inspection, pipeline inspection, surveys, drilling support, construction support, debris removal, call-out work, platform cleaning, subsea installations, telecommunications support, and object location and recovery.

- ROVs are incredibly complex and serve various sectors, such as search and rescue, military, aquaculture, recreation, discovery, oil and gas industry, offshore energy, submerged infrastructure, and shipping.
- Oil production in the Asia-Pacific has decreased significantly (due to the COVID-19 pandemic) from 7642 thousand barrels per day in 2019 to about 7335 thousand barrels per day in 2021. The production is likely to increase due to the ongoing activities in the oil and gas upstream sector since mid-2021, along with the increasing investments due to upcoming projects. Thus, the demand for ROVs during the forecast period is expected to increase.
- Furthermore, ROVs offer the advantage of being operated at extreme depths and can remain underwater for extended periods. Repeated tasks can be completed accurately and under harsh conditions that hamper general driving conditions. Also, ROVs are less bulky compared to human-crewed vehicles. They are also relatively inexpensive.
- EyeROV is one of India's largest and fastest-growing defense tech startups aimed at providing products and solutions services for underwater inspections. The company has already launched the EyeROV TUNA, recognized as India's First Commercial Underwater Drone/Remotely Operated Vehicle (ROV). The ROV can complete over 1000+ hours of operation doing an underwater inspection of bridges, dams, ports, offshore structures, ship hulls, pipelines, and other critical underwater structures.
- ROV technology has also impacted India's offshore oil and gas industry, where the average offshore drilling depth has been rising slowly over the past few years. For instance, in May 2021, when cyclone Tauktae struck the western coast of India, it hit ONGC's offshore installations in the Arabian Sea, resulting in immense infrastructural damage, causing three barges and one drillship to go adrift. In the aftermath of the cyclone, ONGC dispatched OSVs to monitor and repair these offshore installations, which were conducted using ROVs. The capability of ROVs to function remotely in dangerous situations is expected to be a significant factor driving the market during the forecast period.
- Therefore, based on the above-mentioned factors, the ROV vehicle type is expected to witness significant demand in the Asia-Pacific AUV and ROV market during the forecast period.

China to Dominate the Market

- China is one of the leading energy importers and consumers globally. The country has been investing heavily in various industries, such as sub-sea exploration and research, oil and gas, renewables, and defense capabilities. All these industries have a high demand for AUV and ROV,
- Sea dragons are a class of Chinese ROVs capable of diving to a depth of 3,500 meters. They are used to perform various underwater tasks ranging from oil platform service to salvage and rescue missions.
- The Chinese navy has also invested heavily in ROV and AUV technology to develop reconnaissance capabilities, especially in the South China Sea. As China tries to assert its military dominance over the South China Sea region and beyond, the demand for offshore ROV and AUV services is expected to rise over the forecast period.
- As China's domestic energy consumption has grown rapidly, it has increased its domestic hydrocarbon production considerably, leading to a significant rise in offshore upstream and midstream activities. For instance, total liquid consumption has increased significantly from 9.68 thousand barrels per day in 2011 to about 15.52 thousand barrels per day in 2021.
- Furthermore, in November 2021, the Chinese national oil company CNOOC declared that it had started production from Lufeng offshore oil fields in the eastern part of the South China Sea. The main production facilities include two drilling production platforms and one subsea production system.
- Similarly, in January 2021, CNOOC installed the world's first 100,000-ton deep-water semi-submersible production and storage platform, Deep Sea-1. The platform was built by China and will be used to develop the Lingshui gas field. It has an average water depth of 1,450 meters in the South China sea. Such significant infrastructure developments mandate cutting-edge technology for

surveying, monitoring, and maintaining critical hydrocarbon assets, such as drilling platforms and pipelines in deep waters, which is expected to increase the demand for offshore AUV and ROV services in the region during the forecast period.
- Therefore, based on the above factors, China is expected to dominate the AUV and ROV market in the Asia-Pacific region during the forecast period.

APAC AUV & ROV Industry Overview

The Asia-Pacific AUV and ROV market is moderately consolidated. Some of the major players in the market (in no particular order) include DOF Subsea AS, Helix Energy Solutions Group Inc., TechnipFMC PLC, Bourbon Offshore, and Subsea 7 SA.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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