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Robotics-as-a-Service (RaaS) Market - A Global and Regional Analysis: Focus on Application, End User, Product, and Country Analysis - Analysis and Forecast, 2025-2035

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Abstracts

The robotics-as-a-service (RaaS) market is projected to grow from $3,096.8 million in 2025 to $27,589.5 million by 2035, at a CAGR of 24.45%. Growth is driven by advancements in AI integration, cloud-based platforms, and collaborative robotics that enhance operational flexibility and scalability. Rising labor shortages and demand for cost-effective automation are boosting RaaS adoption, particularly in logistics and manufacturing. Professional robotics dominates the type segment, followed by consumer applications. Key challenges include subscription model complexity, scalability of fleet operations, and pricing sustainability. With strong competition from both established players and startups, the market is set for robust expansion, supported by ongoing digital transformation and evolving automation strategies.

Introduction of the Robotics-as-a-Service (RaaS) Market

The study conducted by BIS Research identifies the robotics-as-a-service (RaaS) market as a pivotal enabler of modern industrial automation and operational efficiency infrastructure. RaaS platforms are rapidly evolving into multifunctional assets capable of delivering scalable automation, flexible deployment, and cost-effective robotic solutions across manufacturing, logistics, healthcare, and retail domains. These systems are increasingly essential in supporting mission-critical operations, particularly amid rising labor shortages and the growing need for operational flexibility. With advancements in AI-enabled robotics, cloud platforms, and IoT integration, RaaS solutions are becoming more autonomous, adaptable, and accessible. Their subscription-based and scalable models allow for quick customization based on operational requirements, whether for

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warehouse automation, manufacturing assembly, healthcare assistance, or retail customer service. As business strategies shift toward flexible, service-driven automation, RaaS systems offer a competitive edge through reduced capital expenditure and faster deployment. The market is expected to witness robust growth in the coming years, fueled by increasing automation budgets, operational efficiency demands, and technological innovation.

Market Introduction

The robotics-as-a-service (RaaS) market has become a cornerstone of modern automation and operational efficiency infrastructure, driven by the increasing demand for flexible deployment, cost-effective solutions, and scalable robotic capabilities. As businesses grow more complex and resource-constrained, RaaS platforms, from autonomous mobile robots to collaborative manufacturing systems, deliver essential automation and productivity gains across logistics, manufacturing, healthcare, and retail sectors. Rapid advancements in AI integration, cloud platforms, and collaborative robotics are enhancing autonomy and precision, while subscription-based models, performance guarantees, and managed services are expanding operational accessibility. Amid rising labor shortages and competitive pressures, organizations are accelerating RaaS investments. The market also benefits from flexible applications such as warehouse automation, manufacturing assistance, and customer service robotics. With continued innovation, RaaS solutions are set to play a vital role in the future of flexible, service-driven automation.

Market Introduction

The robotics-as-a-service (RaaS) market is having a profound industrial impact, reshaping manufacturing, logistics, and service sectors through rapid advancements in automation, cloud connectivity, and subscription-based deployment technologies. RaaS platforms, ranging from collaborative robots to autonomous mobile systems, enable scalable automation, operational flexibility, and cost-effective deployment, significantly enhancing productivity across industrial and commercial domains.

The integration of next-generation AI, cloud platforms, and collaborative robotics is driving increased demand for flexible, subscription-based, and performance-guaranteed RaaS solutions. These advancements are improving operational efficiency, reducing deployment barriers, and enabling scalable automation in complex business environments. Additionally, the deployment of RaaS capabilities across warehouse operations, manufacturing processes, and service delivery is fostering cross-sector

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collaborations between robotics OEMs, software providers, and service companies.

As organizations prioritize operational flexibility and cost optimization, the RaaS market is expected to play a pivotal role in enabling more accessible, subscription-driven automation. The industrial ecosystem surrounding RaaS is also evolving rapidly, with strong market demand and rising technology investments pushing innovation forward, cementing RaaS's role as a cornerstone of 21st-century flexible automation and operational efficiency.

Market Segmentation:

Segmentation 1: by Application

- Handling
- Assembling and Dispensing
- Processing
- Dispensing
- Welding and Soldering
- Others

Handling Segment to Lead the Robotics-as-a-Service Market (by Application)

In the robotics-as-a-service (RaaS) market, the handling segment is projected to dominate by application, growing from $849.8 million in 2025 to $7,855.3 million by 2035, at a CAGR of 24.91%. This strong growth is driven by increasing demand for automated material handling, advanced picking and sorting systems, and collaborative robotic solutions capable of delivering persistent, real-time operational efficiency across logistics, manufacturing, and e-commerce domains. As industries worldwide prioritize modern automation capabilities for warehouse management, inventory control, and supply chain optimization, the investment in sophisticated handling robotics continues to rise.

Meanwhile, the assembling and dispensing application is anticipated to be the fastest-

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growing segment with a CAGR of 25.41%, reflecting the rising need for precision assembly operations and flexible manufacturing infrastructure to support increasingly automated production lines. As manufacturing operations become more integrated and quality-sensitive, robust handling and assembly capabilities are essential for production efficiency and quality control.

Following closely, the welding and soldering segment is expected to witness significant growth with a CAGR of 24.41%, fueled by advancements in collaborative robotics, precision welding technologies, and automated joining processes that enhance manufacturing consistency and reduce human exposure to hazardous operations. Robotic welding is playing a critical role in elevating the effectiveness of manufacturing platforms by enabling faster production cycles and improving safety standards across industrial facilities.

These application segments are shaping the future of RaaS solutions, with a shift toward smarter, more flexible, and autonomous operational capabilities that reduce capital expenditure while maximizing productivity and safety outcomes.

Segmentation 2: by End User

- Manufacturing
- Automotive
- Food and Beverage
- Logistics
- Healthcare
- Retail
- Others

Logistics to Maintain Dominance in Robotics-as-a-Service Market (by End User)

In the robotics-as-a-service (RaaS) market, the logistics segment is projected to dominate by end user, growing from $924.4 million in 2025 to $8,933.3 million by 2035,

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at a CAGR of 25.46%. This strong growth is driven by increasing demand for warehouse automation, advanced material handling systems, and autonomous mobile robots capable of delivering persistent, real-time operational efficiency across e-commerce fulfillment centers, distribution hubs, and supply chain networks. As logistics providers worldwide prioritize modern automation capabilities for inventory management, order processing, and last-mile delivery optimization, the investment in sophisticated robotics solutions continues to rise.

Meanwhile, automotive is anticipated to be the second-largest segment with a CAGR of 24.96%, reflecting the rising need for precision manufacturing operations and flexible production infrastructure to support increasingly automated assembly lines. As automotive manufacturing becomes more integrated and quality-sensitive, robust robotics capabilities are essential for production efficiency, safety compliance, and meeting evolving consumer demands for electric and autonomous vehicles.

Following closely, the healthcare segment is expected to witness significant growth with a CAGR of 24.46%, fueled by advancements in surgical robotics, patient care automation, and medical logistics systems that enhance treatment precision and reduce human exposure to infectious diseases. Robotic healthcare solutions are playing a critical role in elevating care delivery effectiveness by enabling faster treatment protocols and improving patient safety standards across medical facilities.

Together, these end-user segments are shaping the future of RaaS solutions, with a shift toward smarter, more specialized, and autonomous operational capabilities that reduce capital expenditure while maximizing productivity, safety, and service quality outcomes across diverse industry verticals.

Segmentation 3: by Type

Professional

Personal

Professional Use to Lead Adoption in Robotics-as-a-Service Market (by Type)

In the robotics-as-a-service (RaaS) market, the professional segment is projected to dominate by type, growing from $2,222.7 million in 2025 to $19,516.6 million by 2035, at a CAGR of 24.27%. This strong growth is driven by rising demand for enterprise?grade

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automation, including warehouse AMRs, industrial cobots, and surgical robots, delivered through subscription models that bundle remote monitoring, maintenance, and software upgrades. As organizations across logistics, manufacturing, and healthcare shift toward OPEX?based robotics deployments, professional RaaS offerings enable rapid scaling of robot fleets, guaranteed uptime, and seamless integration into legacy systems.

Meanwhile, the personal segment is anticipated to be the fastest?growing type with a CAGR of 24.89%, expanding from $874.2 million in 2025 to $8,072.9 million by 2035. Growth is fueled by increasing adoption of domestic cleaning robots, educational kits, and personal companion bots offered on trial?based or pay?per?use plans. As user interfaces, voice control, and smart?home connectivity advance, consumer RaaS solutions lower barriers to entry for robotics enthusiasts and streamline service access without large capital outlays.

Segmentation 4: by Region

North America: U.S., Canada, and Mexico

Europe: Germany, France, the U.K., Italy, and Rest-of-Europe

Asia-Pacific: China, Japan, South Korea, India, and Rest-of-Asia-Pacific

Rest-of-the-World: South America and the Middle East and Africa

In the robotics-as-a-service (RaaS) market, North America is projected to dominate by region, expanding from $1,192.4 million in 2025 to $11,399.7 million by 2035, at a CAGR of 25.33%. This strong growth is driven by widespread adoption of warehouse automation, autonomous mobile robots, and subscription-based integration services across the U.S. and Canada. As enterprises prioritize scalable, OPEX-based robotics deployments for e-commerce fulfillment, manufacturing, and healthcare logistics, investment in North American RaaS offerings continues to surge.

Meanwhile, Europe is anticipated to be the fastest-growing region with a CAGR of 24.83%, rising from $772.1 million in 2025 to $7,092.9 million by 2035. Growth stems from robust industrial robotics ecosystems in Germany, France, and the U.K., supportive regulations, and service providers offering managed robotics fleets for logistics and production automation.

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Following closely, the Asia-Pacific region is expected to grow at a CAGR of 23.43%, increasing from $1,003.1 million in 2025 to $8,232.1 million by 2035, fueled by rapid e-commerce expansion, labor cost pressures, and government initiatives for smart manufacturing in China, Japan, and South Korea.

The Rest-of-the-World region, comprising South America and the Middle East and Africa, is expected to register significant growth, rising from $129.3 million to $864.8 million over the forecast period at a CAGR of 20.93%, driven by emerging infrastructure projects, smart-city deployments, and increasing demand for automated services in logistics and retail.

Demand: Drivers, Limitations, and Opportunities

Market Demand Drivers: Elimination of Upfront Investment, Increased Automation, and Labor Shortage

Robotics-as-a-service (RaaS) is gaining momentum as an attractive subscription model that allows businesses to lease or rent robotic solutions, eliminating the need for hefty upfront capital expenditures and ongoing maintenance complexity. This business model particularly benefits small and medium-sized enterprises (SMEs), enabling them to adopt automation flexibly and cost-effectively. During the COVID-19 pandemic, RaaS demonstrated its value by supporting surge demand in inventory management and healthcare operations without large capital investments. By reducing operational costs and boosting accuracy, RaaS allows companies to scale robotics usage based on demand, redirect human effort toward higher-value tasks, and minimize downtime caused by human error.

A growing demand for advanced automation in industries such as logistics and manufacturing is further fueling the RaaS market. Autonomous mobile robots (AMRs) and collaborative robots (cobots) increasingly navigate warehouse environments, optimizing handling, assembly, and packaging tasks with minimal human intervention. Strategic partnerships are expanding adoption, like the collaboration between GXO Logistics and Agility Robotics, deploying humanoid robots via RaaS in warehouses. Adoption in manufacturing enhances operational flexibility, reduces unplanned downtime, and results in significant cost savings by integrating AI, IoT, and cloud technologies, which support digital applications like demand forecasting and supply chain optimization.

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The acute labor shortage across the globe is a critical driver accelerating RaaS adoption. Aging populations, skill mismatches, and restrictive policies have led to a severe lack of skilled workers in sectors such as healthcare, manufacturing, and logistics. RaaS offers a scalable solution, enabling businesses to maintain continuous production and operations despite workforce constraints. Automation handles routine or hazardous tasks, allowing human workers to focus on complex and specialized functions.

Market Challenges: Subscription Model Complexity, Unit Economics, and Scalability

Adoption of RaaS faces barriers, including the complexity of choosing appropriate subscription models, which vary between time-based and output-based billing. Determining the optimal model depends on specific operational needs, financial capacity, and industry nuances, which can complicate decision-making for potential adopters. Additionally, maintaining sustainable unit economics poses a challenge for providers who balance upfront costs with ongoing maintenance, software updates, and service commitments. Outcome-based pricing models introduce volatility that may deter smaller clients.

Scaling fleet operations from pilot deployments to thousands of robots requires robust cloud-based management platforms, comprehensive service networks, and dependable supply chains. Geographic dispersion and custom system integrations demand investments in infrastructure and skilled technical support. Providers lacking these resources risk reduced customer satisfaction and increased downtime, hindering market expansion.

Market Opportunities: SME Growth and AI, IoT, Cloud Enhancements

The rapid expansion of SMEs worldwide offers a substantial opportunity for RaaS providers, as these businesses seek cost-effective automation to improve operational efficiency and scalability. Particularly in the Asia-Pacific region, nearly half of global SMEs reside, with growth accelerated by digital transformation, government support, and widespread internet penetration. E-commerce startups and IT-related SMEs are leading adopters, driving demand for flexible robotic solutions in warehousing and order fulfillment.

Continuous technological advancement in artificial intelligence (AI), the Internet of Things (IoT), and cloud computing significantly enhances RaaS platforms. AI empowers robots with adaptive learning and decision-making, while IoT enables real-time

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monitoring and communication, reducing operational downtime. Cloud platforms facilitate scalable, remote access to robotics services, lowering infrastructure costs and accelerating deployments. These innovations position RaaS as a cornerstone of future competitive advantage for enterprises navigating an increasingly automated, data-centric market landscape.

How can this report add value to an organization?

Product/Innovation Strategy: This report offers detailed insights into the evolving RaaS market, enabling organizations to tailor their product strategies to current and emerging demands. It highlights key innovations such as cloud-based subscription models, AI-powered robotics, IoT-enabled fleet monitoring, and scalable automation platforms. Businesses can leverage these insights for strategic R&D planning, product development, and building roadmaps that align with future automation trends. The report also stresses modularity and integration flexibility as critical attributes supporting scalability and cross-industry applications.

Growth/Marketing Strategy: The RaaS market presents substantial growth opportunities across multiple sectors, including logistics, manufacturing, and healthcare. Strategic approaches analyzed in this report include partnerships, geographic expansion, and service-based pricing models. Companies can identify promising verticals and regions where automation adoption is accelerating. The report provides actionable advice on market entry, channel development, and customer acquisition strategies, facilitating optimized investment and marketing resource allocation.

Competitive Strategy: The report profiles leading RaaS service providers, system integrators, and ecosystem partners. It offers a comprehensive competitive landscape, detailing contract wins, joint ventures, and alliance strategies. This enables stakeholders to pinpoint high-growth segments and optimize their market positioning through innovation and collaborations. As RaaS becomes an essential part of industrial and commercial operations, competition will increase around service quality, technological advancement, and operational reach.

Research Methodology

Factors for Data Prediction and Modelling

The base currency considered for the robotics-as-a-service (RaaS) market analysis is the US$. Currencies other than the US$ have been converted to the

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US$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate on the Oanda website.

Nearly all the recent developments from January 2021 to March 2024 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major technological breakthroughs.

Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the robotics-as-a-service (RaaS) market.

The market engineering process involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes has been explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Primary Research

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The primary sources involve industry experts from the robotics-as-a-service (RaaS) market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

validation and triangulation of all the numbers and graphs

validation of report segmentations and key qualitative findings

understanding the competitive landscape

validation of the numbers of various markets for the market type

percentage split of individual markets for geographical analysis

Secondary Research

This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as the Census Bureau, OICA, and ACEA.

Secondary research has been done to obtain crucial information about the industry’s value chain, revenue models, the market’s monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

segmentations and percentage shares

data for market value

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key industry trends of the top players in the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled in the robotics-as-a-service (RaaS) market have been selected based on inputs gathered from primary experts, who have analyzed company coverage, product portfolio, and market penetration.

Some of the prominent names in the robotics-as-a-service (RaaS) market are:

Locus Robotics

ABB Ltd.

KUKA AG

Berkshire Grey

Zebra Technologies Corporation

United Robotics Group

Vecna Robotics

inVia Robotics Inc.

Formic Technologies

Knightscope Inc.

Companies that are not a part of the aforementioned pool have been well represented across different sections of the robotics-as-a-service (RaaS) market report (wherever

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applicable).

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