

Global Automatic Pick-and-place Machines Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Automatic Pick-and-place Machines competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Automatic pick-and-place machines are high-precision robotic systems used in surface mount technology (SMT) to automatically place electronic components onto printed circuit boards (PCBs). Equipped with robotic arms, suction nozzles, feeders, and machine vision systems, they can rapidly identify, pick, and position components with minimal human intervention. Unlike manual or semi-automatic machines, automatic pick-and-place machines are optimized for speed, accuracy, and large-scale production. They are essential in manufacturing smartphones, automotive electronics, medical devices, aerospace systems, and industrial electronics, enabling high-density, complex PCB assembly with reduced labor dependency and enhanced efficiency. In 2024, global sales reached approximately 44 k units, with an average global market price of around K US\$ 86 per unit. The automatic pick-and-place machine market will maintain robust growth, fueled by digitalization, electrification, and automation across industries. Asia-Pacific will remain the global manufacturing hub, while Europe and North America emphasize advanced, high-reliability applications. Future growth will be shaped by AI integration, predictive maintenance, and real-time process control, enabling smarter and more efficient manufacturing. Despite high initial investment costs, these machines deliver long-term benefits through improved accuracy, reduced labor reliance, and higher throughput. With the continued rise of miniaturized, multifunctional, and high-performance electronic devices, automatic pick-and-place machines will remain indispensable in global electronics manufacturing. Market Trend The automatic pick-and-place machine market is expanding as electronics manufacturing embraces higher automation levels. Growing demand for compact, multifunctional devices drives

adoption of machines with faster cycle times and higher precision. Integration of Industry 4.0 features such as IoT connectivity, real-time data analysis, and AI-based optimization is a strong trend. Asia-Pacific, especially China, Taiwan, and South Korea, leads due to its dominant electronics production base, while North America and Europe focus on high-reliability applications like aerospace, defense, and medical electronics. Increasing demand for flexible machines that handle high-mix, low-volume production also shapes the market's innovation landscape. Market DriveKey growth drivers include the global rise in consumer electronics, particularly smartphones, tablets, and wearables that require precise and compact PCB assembly. The rapid expansion of automotive electronics in electric vehicles (EVs) and advanced driver-assistance systems (ADAS) creates additional demand. Cost pressures, workforce shortages, and the need for high throughput encourage adoption of automation solutions. Continuous advances in robotics, vision systems, and software enhance machine accuracy, adaptability, and speed. The growing importance of short product lifecycles also drives investment in versatile, reconfigurable equipment. Together, these factors ensure strong global momentum for automatic pick-and-place machines across industries.

Upstream & Downstream Upstream, automatic pick-and-place machines rely on high-grade materials and components such as steel frames, servo motors, linear drives, robotic arms, feeders, placement nozzles, sensors, and precision vision cameras. Robotics, optics, and software providers are critical suppliers. Leading manufacturers include ASMPT, Panasonic, Fuji Corporation, Yamaha Robotics, JUKI, Hanwha, Mycronic, and Kulicke & Soffa. Downstream, electronics manufacturing services (EMS) providers like Foxconn, Pegatron, Jabil, Flex, and BYD Electronics deploy these machines in high-volume production lines. Applications span consumer electronics, automotive electronics, telecommunications, aerospace, medical devices, and industrial equipment, where efficiency, scalability, and high-reliability assembly are essential.

The global Automatic Pick-and-place Machines market size was estimated at USD 3840.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 4.70% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Automatic Pick-and-place Machines market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market

positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Automatic Pick-and-place Machines market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Automatic Pick-and-place Machines market.

Global Automatic Pick-and-place Machines Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Fuji Corporation
ASM Pacific Technology
Panasonic
Yamaha Motor
Mycronic
Juki
Hanwha Precision Machinery
Kulicke & Soffa

Universal Instruments
Europlacer
Mirae
Borui Advanced
Beijing Torch
Faroad
Yiktong Intelligent
ETON Automation Equipment
MOJE Intelligent

Market Segmentation (by Type)

High-Speed Type
Medium-Speed Type

Market Segmentation (by Application)

Consumer Electronics
Telecommunications
Automotive
Medical Devices
Others

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Automatic Pick-and-place Machines Market

Overview of the regional outlook of the Automatic Pick-and-place Machines Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Automatic Pick-and-place Machines Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Automatic Pick-and-place Machines, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions
Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis
Provides insight into the market through Value Chain
Market dynamics scenario, along with growth opportunities of the market in the years to come
6-month post-sales analyst support

Customization of the Report

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