

# **Global Robotic Welding Market: Analysis By Type (Spot Welding, Arc Welding, and Others), By Payload (Less than 50kg, 50kg-150kg, and More than 150kg), By Application (Automotive and Transportation, Electrical and Electronics, Metal and Machinery, Construction, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028**

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## **Abstracts**

Robotic welding is the process of using robotic arms to automate the welding process. In robotic welding, robots are used to perform and handle the welding process based on a program, which can be reprogrammed to suit the intended project. The components of robotic welding equipment include the software with specific programming, the welding equipment delivering the energy from the welding power source to the work piece, and the robot using the equipment to conduct the welding. Robotic welding market encompasses the production, development, manufacturing, and sale of robotic welding machines, equipment, and systems along with provision of related services, such as system integration, installation, maintenance, and training. The global robotic welding market was valued at US\$6.01 billion in 2022. The market value is forecasted to grow to US\$11.57 billion by 2028.

Rapidly developing emerging economies (Southeast Asia, China, India, Japan, Latin America), growing trend of automation in the manufacturing sector, advent of industrial internet of things (IIOT), rising number of automotive manufacturing plants, increasing labor costs, and growing demand for consistent high quality weld provided by welding robots while maintaining product standards and reduced production time. etc., have been positively contributing towards increased demand for welding robots. Other significant factors are digitalization, ongoing advancements in robotic technology, higher

demand for consumer electronics, growing emphasis on increasing integration of digital technologies to reduce dependency on manual labor and ensure continuity of operations even at the time of economic uncertainties, and increasing number of new product launches and innovations in the market by welding robot manufacturing companies to remain competitive in the market and strengthen their current portfolios. The market is anticipated to grow at a CAGR of approx. 11.5% during the forecasted period of 2023-2028.

#### Market Segmentation Analysis:

**By Type:** The report provides the bifurcation of the market into three segments on the basis of type: spot welding, arc welding, and others. Spot robotic welding market is the largest segment of global robotic welding market owing to growing trend of automation in various industries, expansion of industrial infrastructure in emerging economies, increased need for consistent and precise welding processes, and high accessibility and improved efficiency of spot welding for robot automation in comparison to other welding methods.

**By Payload:** The report provides the bifurcation of the market into three segments based on payload: less than 50kg, 50kg-150kg, and more than 150kg. 50kg-150kg robotic welding market is both the largest and fastest growing segment of global robotic welding market owing to rising demand for electric vehicles, ease of loading and unloading operations, increasing demand from end use industries for welding heavy-body panels, and added advantage offered by these robots to industrial companies in terms of space and money as medium-scale welding can mostly be done using one machine, and these machines can easily be floor mounted in case of limited space availability.

**By Application:** The report provides the bifurcation of the market into five segments on the basis of application: automotive and transportation, electrical and electronics, metal and machinery, construction, and others. Automotive and transportation robotic welding market is both the largest and fastest growing segment of global robotic welding market owing to increasing number of benefits offered by welding robots in the automotive industry's manufacturing process, such as cost-effectiveness, high efficiency, safety, speed & precision, etc., intensifying global competition between various automotive manufacturers for the production of accurate and high-quality automobiles, growing involvement of digitization in the automotive sector, high number of welds required to complete one vehicle, rising emphasis of government on the adoption of EVs, and increasing demand of vehicles in developing economies such as China, India, Brazil,

Iran, etc.

**By Region:** The report provides insight into the robotic welding market based on the regions namely, Asia Pacific, North America, Europe, and rest of the world. Asia Pacific robotic welding market holds the largest share of global robotic welding market, driven by increasing number of manufacturers in the region who are focusing on robotic automation to improve productivity and output quality, rising labor costs, growing number of small and medium scale businesses manufacturing automobile, electronic devices and other products, and increasing funding, tax incentives and loans provided by the government of several Asian countries to support industrial automation and development of industrial robots.

Asia Pacific robotic welding market is divided into four regions on the basis of geographical operations, namely, China, India, Japan, and rest of Asia Pacific, where China robotic welding market is both the largest and fastest growing region in Asia Pacific robotic welding market, driven by rapidly expanding industrial robot market, country's reputation of being one of the largest manufacturing hub, increasing investment by both local registered and unregistered manufacturers in the region, rising automation in China under "Made in China" 2025 plan, and rapidly expanding automotive & electronic manufacturing sectors, where automation is well-tested and affordable. Asia Pacific robotic welding market is also segmented into three segments on the basis of type, namely, arc welding, spot welding, and others, where spot welding segment held the major share of Asia Pacific robotic welding market.

#### Market Dynamics:

**Growth Drivers:** The global robotic welding market has been rapidly growing over the past few years, due to factors such as rapidly expanding automotive and electronics industry, increasing installations of industrial robots, high wages in manufacturing, increasing adoption of industry 4.0 principles, growing demand in emerging markets, etc. Industrial robots offer high levels of automation and efficiency in performing repetitive tasks, improving the overall productivity of a factory or a warehouse. Additionally, increasing number of installations of industrial robots, including welding robots will create higher recognition, awareness, and acceptance of their value in the manufacturing process, encouraging industries to invest in welding robots and creating new opportunities for manufacturers and suppliers of welding robot systems, components, and related services to expand their consumer base. Therefore, growing adoption of industrial robots will continue to have a positive impact on the global demand of welding robots, boosting the growth of global welding robot market in the

forecasted years.

**Challenges:** However, the market growth would be negatively impacted by various challenges such as high installation and maintenance costs, rising concerns regarding job displacement, etc. Adoption of robotic welding is associated with high investment at the initial stage for procurement, programming, and maintenance of welding robots. Implementing robotic welding systems involves significant upfront costs, including the purchase of robots, peripheral equipment, and integration of welding robots with existing infrastructure, acting as a barrier for new entrants such as small and medium-sized enterprises (SMEs) or companies with limited capital resources that find it difficult to capitalize on high funds owing to low-volume production. Therefore, high initial investment and maintenance cost associated with employing automated systems and integration of high-quality hardware with efficient software control system, will continue to impend the growth of global robotic welding market in the forecasted years.

**Trends:** The market is projected to grow at a fast pace during the forecasted period, due to various latest trends such as integration of artificial intelligence (AI) and machine learning (ML), ongoing advancements in robotic technology, increasing penetration of hybrid welding processes, emergence of laser and plasma welding technologies etc. Increasing penetration of hybrid welding processes is creating new opportunities for growth as with more industries recognizing the benefits of hybrid welding, there is an increasing demand for robotic welding systems that are capable of performing these complex processes. Also, use of hybrid welding processes has enabled robots to weld dissimilar materials, thick plates, and complex geometries with greater ease and accuracy, allowing robotic welding systems to cater to a broader range of industries and manufacturing requirements. Therefore, increasing penetration of hybrid welding processes is expected to boost the growth of global robotic welding market in the upcoming years.

#### Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. Lockdown policies, imposed by the government to prevent the spread of virus forced various end user industries, robot manufacturing facilities, and robotics system integrators to either shut down or run low on production capacity, resulting in reduced demand, production and installation of robotic welding systems and equipment in various key industries, such as automotive, electrical, electronics, and metals & machinery. Also, there were increasing restrictions in the form of social

distancing policies & the number of people that were allowed by robot manufacturing plants to work in a physical environment and with robot manufacturing companies relying heavily on physical presence of experienced workforce to handle the intricate processes involved in robot production, COVID-19 pandemic shifted everything online, making it difficult for robot manufacturing facilities to meet up with the ongoing demand and maintain on time delivery of robotic welding systems, leading to reduced production capacity, increasing delays in the deployment of robotic welding solutions, and disrupted supply of new robotic welding equipment.

Furthermore, the robotic supply chain began to stabilize in late Q3 of 2020, and robotics manufacturers began to see greater sales recovery beginning in 2021, indicating a positive recovery in the global demand of welding robots in the post COVID-19 period.

#### Competitive Landscape:

Global robotic welding market is midly consolidated with major players acquiring majority of the market share and increasing number of regional and local players worldwide catering to the local demand and engaging in various research & development activities and initiatives to develop and deploy new and more efficient products in the robotic welding market.

The key players of the market are:

Panasonic Corporation (Panasonic Connect Co., Ltd.)

ABB Group

DENSO Corporation (DENSO WAVE INCORPORATED.)

Kawasaki Heavy Industries, Ltd.

Yaskawa Electric Corporation

Fanuc Corporation

KUKA Group

Nachi-Fujikoshi Corporation

DAIHEN Corporation

Stellantis N.V. (Comau S.p.A.)

The Lincoln Electric Company

United ProArc Corporation

Major companies in the market are engaged in strategic agreements & contacts, increasing number of new product launches, mergers and acquisitions, and geographical expansion to gain larger market share. For instance, on August 23, 2022, YASKAWA Electric Corporation announced the launch of a new lineup of MOTOMAN-HC30PL (30 kg payload capacity, 1600 mm reach), a model to palletizing applications such as cardboard, for the human collaboration robot series that has been developed with 10 kg and 20 kg payload capacity. Similarly, on June 01, 2023, Panasonic Holdings Co., Ltd. (Panasonic HD) announced that the company has developed a new technology for efficient path planning, which is expected to expand the use of autonomous robots in environments where people and multiple robots coexist in a limited space, such as indoors.



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