

Global Dual-arm Industrial Robot Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Dual-arm Industrial Robot market size is expected to reach \$ 4919 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Dual-arm industrial robots are high-end industrial robotic systems designed for manufacturing, assembly, material handling, inspection, and flexible manipulation scenarios. Their core feature is the integration of two robotic arms, end-effectors, machine vision, force sensing, safety control, and task-planning capabilities on a unified control platform, enabling the equipment to emulate human two-handed operations such as grasping, positioning, assembly, transfer, fastening, packaging, machine tending, and multi-process coordination. These products mainly address the limitations of conventional single-arm robots in complex material handling, bimanual assembly, non-structured workstation changeover, and human-robot shared production lines. Their key technical paradigms include dual-arm kinematic coordination, multi-axis redundant control, collision detection, hybrid force-position control, machine vision recognition, mobile navigation, tool changing, and intelligent task orchestration. Typical customers include automotive components, 3C electronics, semiconductors, pharmaceutical packaging, precision manufacturing, logistics and warehousing, and research and education institutions. Common delivery formats include fixed dual-arm robots, collaborative dual-arm robots, mobile dual-arm robots, and embodied-intelligence dual-arm platforms.

Dual-arm industrial robots are evolving from dedicated automation equipment into general-purpose flexible manipulation platforms. Their core value is no longer limited to replacing human labor in a single handling action. Instead, through the coordinated movement of two robotic arms under a unified control system, they can perform complex tasks that are closer to the logic of human two-handed operation. Compared

with conventional single-arm industrial robots, dual-arm structures enable more natural task division in assembly, holding, positioning, flipping, insertion, fastening, and packaging, thereby reducing dependence on dedicated fixtures and peripheral mechanisms while improving changeover efficiency in high-mix, low-volume production lines. As machine vision, force compliance, safety monitoring, and task planning capabilities continue to mature, the difficulty of deploying dual-arm robots in existing workstations is decreasing, allowing them to better adapt to electronics manufacturing, automotive components, pharmaceutical packaging, precision inspection, and research and education scenarios. Future competition will expand from standalone hardware parameters to full-machine control, process software, end-tool ecosystems, and system integration capabilities. Products with open interfaces and secondary-development capabilities are more likely to generate sustained application value.

The growth of industry demand is driven by the manufacturing sector's long-term pursuit of flexibility, reduced labor dependence, and highly consistent operations. In electronics and precision manufacturing, components are small, process changes are frequent, and assembly actions are complex. Dual-arm robots can improve cycle stability by using one arm to hold and the other to operate, while reducing assembly errors with the support of vision guidance and force-feedback control. In automotive and general industrial scenarios, customers place greater emphasis on handling, machine tending, component transfer, and human-robot shared workstations. Through dual-arm coordination, these robots can reduce fixture design complexity and improve workstation reuse. The emergence of mobile dual-arm robots and embodied-intelligence dual-arm platforms has further extended the product boundary from fixed workstations to cross-station handling, equipment inspection, sample collection, and data acquisition. Because these products involve mechanical structures, motion control, sensor fusion, safety certification, and industry-specific process databases, full standardization remains difficult in the short term. However, as base platforms mature and application software accumulates, the industry is expected to gradually shift from project-based delivery toward platform-based delivery.

In terms of regional structure, Japan, Europe, China, and South Korea all have strong participation in the industry. Japanese companies have deep experience in conventional industrial robots, precision assembly, and collaborative dual-arm products. European companies have advantages in collaborative safety, automotive customers, and high-end manufacturing customer bases. Chinese companies are accelerating their catch-up by leveraging manufacturing application scenarios, mobile robot supply chains, and investment in embodied-intelligence research and development. Consumption is mainly concentrated in Asia, Europe, and North America. Asia remains the most active

deployment market due to the large scale of its electronics, automotive, semiconductor, and general industrial manufacturing sectors.

This report studies the global Dual-arm Industrial Robot production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dual-arm Industrial Robot and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Dual-arm Industrial Robot that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Dual-arm Industrial Robot total production and demand, 2021-2032, (K Units)

Global Dual-arm Industrial Robot total production value, 2021-2032, (USD Million)

Global Dual-arm Industrial Robot production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Dual-arm Industrial Robot consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Dual-arm Industrial Robot domestic production, consumption, key domestic manufacturers and share

Global Dual-arm Industrial Robot production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Dual-arm Industrial Robot production by Structural Form, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Dual-arm Industrial Robot production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Dual-arm Industrial Robot market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ABB, Yaskawa Electric, Kawasaki Heavy Industries, Kawada Robotics, Seiko Epson, Hunan Cothink Robotics Tech, ROKAE Robotics, Rainbow Robotics, DOBOT, Fourier Intelligence, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices

used in analyzing the World Dual-arm Industrial Robot market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Structural Form, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Dual-arm Industrial Robot Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Dual-arm Industrial Robot Market, Segmentation by Structural Form:

Fixed Tabletop Dual-Arm Robot

Mobile Base Dual-Arm Robot

Full-Size Humanoid Dual-Arm Robot

Others

Global Dual-arm Industrial Robot Market, Segmentation by Arm Configuration:

Dual Seven-Axis Articulated Arms

Dual Six-Axis Articulated Arms

Dual Four-Axis SCARA Arms

Others

Global Dual-arm Industrial Robot Market, Segmentation by Mobility Capability:

Fixed Workstation

Relocatable Workstation

Autonomous Wheeled Mobility

Bipedal Mobility

Others

Global Dual-arm Industrial Robot Market, Segmentation by Application:

Assembling

Machine Maintenance

Material Handling

Material Removal

Seal / Distribution

Consumer Electronics Industrial

Companies Profiled:

ABB

Yaskawa Electric

Kawasaki Heavy Industries

Kawada Robotics

Seiko Epson

Hunan Cothink Robotics Tech

ROKAE Robotics

Rainbow Robotics

DOBOT

Fourier Intelligence

Key Questions Answered:

1. How big is the global Dual-arm Industrial Robot market?
2. What is the demand of the global Dual-arm Industrial Robot market?
3. What is the year over year growth of the global Dual-arm Industrial Robot market?
4. What is the production and production value of the global Dual-arm Industrial Robot market?
5. Who are the key producers in the global Dual-arm Industrial Robot market?
6. What are the growth factors driving the market demand?

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