

Global Glass Substrate Transfer Robot Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Glass Substrate Transfer Robot market size was valued at US\$ 314 million in 2025 and is forecast to a readjusted size of US\$ 421 million by 2032 with a CAGR of 4.5% during review period.

Global sales of Glass Substrate Transfer Robot was about 1630 units in 2024 with average price of 183 K USD/Unit.

Leading LCD and OLED producers like Samsung Display, LG Display, BOE, are the target clients of the product.

The average gross margin of the industry ranges from 40%-50%.

Glass Substrate Transfer Robot refers to an automatic handling system designed to pick up, transfer and place large-area glass substrates between different process tools, cassettes and storage positions in flat panel display (FPD), semiconductor, advanced packaging and related glass-based manufacturing lines. These robots typically adopt cleanroom-grade mechanical structures, vacuum or electrostatic end effectors, and multi-axis motion control to ensure particle-controlled, low-vibration, low-stress handling of thin and brittle glass substrates. A glass substrate transfer robot is usually integrated with load ports, stockers, conveyors and process tools to form fully automated material handling systems, supporting high throughput, high yield and traceability in mass production lines.

Demand for glass substrate transfer robots is closely tied to capex cycles in flat panel display (FPD), touch panel and emerging semiconductor glass-substrate lines. As panel

makers move to larger generations, thinner glass and higher resolution (OLED, QLED, Mini/Micro-LED), manual or semi-automatic handling cannot meet requirements on particle control, yield and takt time, so fabs have strong incentives to upgrade to fully automated transfer systems. At the same time, rising labor costs and stricter EHS regulations in China, Korea and other Asian production bases push factories to replace repetitive, high-risk glass handling operations with cleanroom robots, especially for heavy G8+ panels and fragile ultra-thin glass.

On the other hand, the market remains structurally challenging because downstream customers are highly concentrated and investment is strongly cyclical: a small number of panel and semiconductor OEMs decide most orders, and once a line is built, it will not be replaced for many years. This leads to long verification cycles, very tough cost negotiations, and strong bargaining power on the buyer side. New entrants not only need to pass reliability, cleanliness and safety tests in real fabs, but also have to integrate seamlessly with existing stockers, load ports, AMHS / OHT systems and fab MES software; any failure that causes glass breakage or line downtime is essentially unacceptable. Continuous panel-price pressure also feeds back as intense pricing pressure on robot suppliers, making it difficult to maintain margins purely by selling hardware? without strong engineering and service capability.

Technical barriers mainly come from three directions: mechanics, control and system integration. Handling large, thin and heavy glass requires multi-point support structures with very low vibration and deflection, precise trajectory planning and synchronized motion, often in vacuum or ultra-clean environments where materials, lubricants and outgassing must all meet strict standards. End effectors such as vacuum or electrostatic chucks must distribute forces uniformly to avoid micro-cracks and particles, while high-precision encoders and motion controllers must guarantee repeatability at sub-millimeter level over long travel distances. On top of that, vendors need strong capabilities in SECS/GEM or similar communication protocols, safety interlocks and diagnostics, so that robots can be tightly coupled into the fab's overall automation architecture and run 24/7 with high availability.

Looking ahead, glass substrate transfer robots are trending toward larger size capability, higher intelligence and deeper integration. As G8.6, G10 and future generations ramp, system designs will shift further to gantry-type and overhead solutions with higher payloads and multi-glass handling. At the same time, fabs are pushing for smarter logistics: integration with factory-level AMHS, use of vision systems and sensors for automatic alignment and defect avoidance, and application of data analytics / AI for predictive maintenance and path optimization. Another clear direction

is localization?particularly in China?where panel and advanced packaging lines hope to reduce dependence on Japanese and Korean equipment by adopting competitive domestic robots, provided that they can match cleanliness, reliability and lifecycle support. In niche areas such as glass-core advanced packaging and high-end optical / substrate manufacturing, glass transfer robots are also expected to gradually migrate from pure FPD applications into semiconductor backend and system-in-package lines, further expanding their addressable market.

This report is a detailed and comprehensive analysis for global Glass Substrate Transfer Robot market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Glass Substrate Transfer Robot market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Glass Substrate Transfer Robot market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Glass Substrate Transfer Robot market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Glass Substrate Transfer Robot market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Glass Substrate Transfer Robot

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Glass Substrate Transfer Robot market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Hirata Corporation, Nidec, PHT Inc., JEL Corporation, DAIHEN Corporation, Nachi-Fujikoshi Corp, Rorze Corporation, Yaskawa, Robostar, Sanwa Engineering Corporation, etc.

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

Market Segmentation

Glass Substrate Transfer Robot market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Single Arm

Double Arm

Other

Market segment by Operating Environment

Vacuum Room

Atmospheric Room

Market segment by Generation

3.5-5.5 Gen

6-10.5 Gen

Market segment by Application

LCDs

OLEDs

Major players covered

Hirata Corporation

Nidec

PHT Inc.

JEL Corporation

DAIHEN Corporation

Nachi-Fujikoshi Corp

Rorze Corporation

Yaskawa

Robostar

Sanwa Engineering Corporation

Siasun Robot & Automation

Hefei Sineva Intelligent Machine

Robots & Design C

Hyundai Robotics

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Glass Substrate Transfer Robot product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Glass Substrate Transfer Robot, with price, sales quantity, revenue, and global market share of Glass Substrate Transfer Robot from 2021 to 2026.

Chapter 3, the Glass Substrate Transfer Robot competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Glass Substrate Transfer Robot breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Glass Substrate Transfer Robot market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Glass Substrate Transfer Robot.

Chapter 14 and 15, to describe Glass Substrate Transfer Robot sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Glass Substrate Transfer Robot Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Single Arm

1.3.3 Double Arm

1.3.4 Other

1.4 Market Analysis by Operating Environment

1.4.1 Overview: Global Glass Substrate Transfer Robot Consumption Value by Operating Environment: 2021 Versus 2025 Versus 2032

1.4.2 Vacuum Room

1.4.3 Atmospheric Room

1.5 Market Analysis by Generation

1.5.1 Overview: Global Glass Substrate Transfer Robot Consumption Value by Generation: 2021 Versus 2025 Versus 2032

1.5.2 3.5-5.5 Gen

1.5.3 6-10.5 Gen

1.6 Market Analysis by Application

1.6.1 Overview: Global Glass Substrate Transfer Robot Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 LCDs

1.6.3 OLEDs

1.7 Global Glass Substrate Transfer Robot Market Size & Forecast

1.7.1 Global Glass Substrate Transfer Robot Consumption Value (2021 & 2025 & 2032)

1.7.2 Global Glass Substrate Transfer Robot Sales Quantity (2021-2032)

1.7.3 Global Glass Substrate Transfer Robot Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Hirata Corporation

2.1.1 Hirata Corporation Details

2.1.2 Hirata Corporation Major Business

2.1.3 Hirata Corporation Glass Substrate Transfer Robot Product and Services

2.1.4 Hirata Corporation Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Hirata Corporation Recent Developments/Updates

2.2 Nidec

2.2.1 Nidec Details

2.2.2 Nidec Major Business

2.2.3 Nidec Glass Substrate Transfer Robot Product and Services

2.2.4 Nidec Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Nidec Recent Developments/Updates

2.3 PHT Inc.

2.3.1 PHT Inc. Details

2.3.2 PHT Inc. Major Business

2.3.3 PHT Inc. Glass Substrate Transfer Robot Product and Services

2.3.4 PHT Inc. Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 PHT Inc. Recent Developments/Updates

2.4 JEL Corporation

2.4.1 JEL Corporation Details

2.4.2 JEL Corporation Major Business

2.4.3 JEL Corporation Glass Substrate Transfer Robot Product and Services

2.4.4 JEL Corporation Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 JEL Corporation Recent Developments/Updates

2.5 DAIHEN Corporation

2.5.1 DAIHEN Corporation Details

2.5.2 DAIHEN Corporation Major Business

2.5.3 DAIHEN Corporation Glass Substrate Transfer Robot Product and Services

2.5.4 DAIHEN Corporation Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 DAIHEN Corporation Recent Developments/Updates

2.6 Nachi-Fujikoshi Corp

2.6.1 Nachi-Fujikoshi Corp Details

2.6.2 Nachi-Fujikoshi Corp Major Business

2.6.3 Nachi-Fujikoshi Corp Glass Substrate Transfer Robot Product and Services

2.6.4 Nachi-Fujikoshi Corp Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Nachi-Fujikoshi Corp Recent Developments/Updates

2.7 Rorze Corporation

- 2.7.1 Rorze Corporation Details
- 2.7.2 Rorze Corporation Major Business
- 2.7.3 Rorze Corporation Glass Substrate Transfer Robot Product and Services
- 2.7.4 Rorze Corporation Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.7.5 Rorze Corporation Recent Developments/Updates
- 2.8 Yaskawa
 - 2.8.1 Yaskawa Details
 - 2.8.2 Yaskawa Major Business
 - 2.8.3 Yaskawa Glass Substrate Transfer Robot Product and Services
 - 2.8.4 Yaskawa Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Yaskawa Recent Developments/Updates
- 2.9 Robostar
 - 2.9.1 Robostar Details
 - 2.9.2 Robostar Major Business
 - 2.9.3 Robostar Glass Substrate Transfer Robot Product and Services
 - 2.9.4 Robostar Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.9.5 Robostar Recent Developments/Updates
- 2.10 Sanwa Engineering Corporation
 - 2.10.1 Sanwa Engineering Corporation Details
 - 2.10.2 Sanwa Engineering Corporation Major Business
 - 2.10.3 Sanwa Engineering Corporation Glass Substrate Transfer Robot Product and Services
 - 2.10.4 Sanwa Engineering Corporation Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.10.5 Sanwa Engineering Corporation Recent Developments/Updates
- 2.11 Siasun Robot & Automation
 - 2.11.1 Siasun Robot & Automation Details
 - 2.11.2 Siasun Robot & Automation Major Business
 - 2.11.3 Siasun Robot & Automation Glass Substrate Transfer Robot Product and Services
 - 2.11.4 Siasun Robot & Automation Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.11.5 Siasun Robot & Automation Recent Developments/Updates
- 2.12 Hefei Sineva Intelligent Machine
 - 2.12.1 Hefei Sineva Intelligent Machine Details
 - 2.12.2 Hefei Sineva Intelligent Machine Major Business

2.12.3 Hefei Sineva Intelligent Machine Glass Substrate Transfer Robot Product and Services

2.12.4 Hefei Sineva Intelligent Machine Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.12.5 Hefei Sineva Intelligent Machine Recent Developments/Updates

2.13 Robots & Design C

2.13.1 Robots & Design C Details

2.13.2 Robots & Design C Major Business

2.13.3 Robots & Design C Glass Substrate Transfer Robot Product and Services

2.13.4 Robots & Design C Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 Robots & Design C Recent Developments/Updates

2.14 Hyundai Robotics

2.14.1 Hyundai Robotics Details

2.14.2 Hyundai Robotics Major Business

2.14.3 Hyundai Robotics Glass Substrate Transfer Robot Product and Services

2.14.4 Hyundai Robotics Glass Substrate Transfer Robot Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.14.5 Hyundai Robotics Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: GLASS SUBSTRATE TRANSFER ROBOT BY MANUFACTURER

3.1 Global Glass Substrate Transfer Robot Sales Quantity by Manufacturer (2021-2026)

3.2 Global Glass Substrate Transfer Robot Revenue by Manufacturer (2021-2026)

3.3 Global Glass Substrate Transfer Robot Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Glass Substrate Transfer Robot by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Glass Substrate Transfer Robot Manufacturer Market Share in 2025

3.4.3 Top 6 Glass Substrate Transfer Robot Manufacturer Market Share in 2025

3.5 Glass Substrate Transfer Robot Market: Overall Company Footprint Analysis

3.5.1 Glass Substrate Transfer Robot Market: Region Footprint

3.5.2 Glass Substrate Transfer Robot Market: Company Product Type Footprint

3.5.3 Glass Substrate Transfer Robot Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Glass Substrate Transfer Robot Market Size by Region

4.1.1 Global Glass Substrate Transfer Robot Sales Quantity by Region (2021-2032)

4.1.2 Global Glass Substrate Transfer Robot Consumption Value by Region (2021-2032)

4.1.3 Global Glass Substrate Transfer Robot Average Price by Region (2021-2032)

4.2 North America Glass Substrate Transfer Robot Consumption Value (2021-2032)

4.3 Europe Glass Substrate Transfer Robot Consumption Value (2021-2032)

4.4 Asia-Pacific Glass Substrate Transfer Robot Consumption Value (2021-2032)

4.5 South America Glass Substrate Transfer Robot Consumption Value (2021-2032)

4.6 Middle East & Africa Glass Substrate Transfer Robot Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Glass Substrate Transfer Robot Sales Quantity by Type (2021-2032)

5.2 Global Glass Substrate Transfer Robot Consumption Value by Type (2021-2032)

5.3 Global Glass Substrate Transfer Robot Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Glass Substrate Transfer Robot Sales Quantity by Application (2021-2032)

6.2 Global Glass Substrate Transfer Robot Consumption Value by Application (2021-2032)

6.3 Global Glass Substrate Transfer Robot Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Glass Substrate Transfer Robot Sales Quantity by Type (2021-2032)

7.2 North America Glass Substrate Transfer Robot Sales Quantity by Application (2021-2032)

7.3 North America Glass Substrate Transfer Robot Market Size by Country

7.3.1 North America Glass Substrate Transfer Robot Sales Quantity by Country (2021-2032)

7.3.2 North America Glass Substrate Transfer Robot Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Glass Substrate Transfer Robot Sales Quantity by Type (2021-2032)

8.2 Europe Glass Substrate Transfer Robot Sales Quantity by Application (2021-2032)

8.3 Europe Glass Substrate Transfer Robot Market Size by Country

8.3.1 Europe Glass Substrate Transfer Robot Sales Quantity by Country (2021-2032)

8.3.2 Europe Glass Substrate Transfer Robot Consumption Value by Country
(2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Glass Substrate Transfer Robot Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific Glass Substrate Transfer Robot Sales Quantity by Application
(2021-2032)

9.3 Asia-Pacific Glass Substrate Transfer Robot Market Size by Region

9.3.1 Asia-Pacific Glass Substrate Transfer Robot Sales Quantity by Region
(2021-2032)

9.3.2 Asia-Pacific Glass Substrate Transfer Robot Consumption Value by Region
(2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Glass Substrate Transfer Robot Sales Quantity by Type
(2021-2032)

10.2 South America Glass Substrate Transfer Robot Sales Quantity by Application
(2021-2032)

10.3 South America Glass Substrate Transfer Robot Market Size by Country

10.3.1 South America Glass Substrate Transfer Robot Sales Quantity by Country (2021-2032)

10.3.2 South America Glass Substrate Transfer Robot Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Glass Substrate Transfer Robot Sales Quantity by Type (2021-2032)

11.2 Middle East & Africa Glass Substrate Transfer Robot Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa Glass Substrate Transfer Robot Market Size by Country

11.3.1 Middle East & Africa Glass Substrate Transfer Robot Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa Glass Substrate Transfer Robot Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Glass Substrate Transfer Robot Market Drivers

12.2 Glass Substrate Transfer Robot Market Restraints

12.3 Glass Substrate Transfer Robot Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Glass Substrate Transfer Robot and Key Manufacturers

13.2 Manufacturing Costs Percentage of Glass Substrate Transfer Robot

- 13.3 Glass Substrate Transfer Robot Production Process
- 13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

- 14.1 Sales Channel
 - 14.1.1 Direct to End-User
 - 14.1.2 Distributors
- 14.2 Glass Substrate Transfer Robot Typical Distributors
- 14.3 Glass Substrate Transfer Robot Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Glass Substrate Transfer Robot Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Glass Substrate Transfer Robot Consumption Value by Operating Environment, (USD Million), 2021 & 2025 & 2032

Table 3. Global Glass Substrate Transfer Robot Consumption Value by Generation, (USD Million), 2021 & 2025 & 2032

Table 4. Global Glass Substrate Transfer Robot Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. Hirata Corporation Basic Information, Manufacturing Base and Competitors

Table 6. Hirata Corporation Major Business

Table 7. Hirata Corporation Glass Substrate Transfer Robot Product and Services

Table 8. Hirata Corporation Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. Hirata Corporation Recent Developments/Updates

Table 10. Nidec Basic Information, Manufacturing Base and Competitors

Table 11. Nidec Major Business

Table 12. Nidec Glass Substrate Transfer Robot Product and Services

Table 13. Nidec Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. Nidec Recent Developments/Updates

Table 15. PHT Inc. Basic Information, Manufacturing Base and Competitors

Table 16. PHT Inc. Major Business

Table 17. PHT Inc. Glass Substrate Transfer Robot Product and Services

Table 18. PHT Inc. Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. PHT Inc. Recent Developments/Updates

Table 20. JEL Corporation Basic Information, Manufacturing Base and Competitors

Table 21. JEL Corporation Major Business

Table 22. JEL Corporation Glass Substrate Transfer Robot Product and Services

Table 23. JEL Corporation Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. JEL Corporation Recent Developments/Updates

Table 25. DAIHEN Corporation Basic Information, Manufacturing Base and Competitors

Table 26. DAIHEN Corporation Major Business

Table 27. DAIHEN Corporation Glass Substrate Transfer Robot Product and Services

Table 28. DAIHEN Corporation Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. DAIHEN Corporation Recent Developments/Updates

Table 30. Nachi-Fujikoshi Corp Basic Information, Manufacturing Base and Competitors

Table 31. Nachi-Fujikoshi Corp Major Business

Table 32. Nachi-Fujikoshi Corp Glass Substrate Transfer Robot Product and Services

Table 33. Nachi-Fujikoshi Corp Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Nachi-Fujikoshi Corp Recent Developments/Updates

Table 35. Rorze Corporation Basic Information, Manufacturing Base and Competitors

Table 36. Rorze Corporation Major Business

Table 37. Rorze Corporation Glass Substrate Transfer Robot Product and Services

Table 38. Rorze Corporation Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. Rorze Corporation Recent Developments/Updates

Table 40. Yaskawa Basic Information, Manufacturing Base and Competitors

Table 41. Yaskawa Major Business

Table 42. Yaskawa Glass Substrate Transfer Robot Product and Services

Table 43. Yaskawa Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Yaskawa Recent Developments/Updates

Table 45. Robostar Basic Information, Manufacturing Base and Competitors

Table 46. Robostar Major Business

Table 47. Robostar Glass Substrate Transfer Robot Product and Services

Table 48. Robostar Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. Robostar Recent Developments/Updates

Table 50. Sanwa Engineering Corporation Basic Information, Manufacturing Base and Competitors

Table 51. Sanwa Engineering Corporation Major Business

Table 52. Sanwa Engineering Corporation Glass Substrate Transfer Robot Product and

Services

Table 53. Sanwa Engineering Corporation Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 54. Sanwa Engineering Corporation Recent Developments/Updates

Table 55. Siasun Robot & Automation Basic Information, Manufacturing Base and Competitors

Table 56. Siasun Robot & Automation Major Business

Table 57. Siasun Robot & Automation Glass Substrate Transfer Robot Product and Services

Table 58. Siasun Robot & Automation Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 59. Siasun Robot & Automation Recent Developments/Updates

Table 60. Hefei Sineva Intelligent Machine Basic Information, Manufacturing Base and Competitors

Table 61. Hefei Sineva Intelligent Machine Major Business

Table 62. Hefei Sineva Intelligent Machine Glass Substrate Transfer Robot Product and Services

Table 63. Hefei Sineva Intelligent Machine Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 64. Hefei Sineva Intelligent Machine Recent Developments/Updates

Table 65. Robots & Design C Basic Information, Manufacturing Base and Competitors

Table 66. Robots & Design C Major Business

Table 67. Robots & Design C Glass Substrate Transfer Robot Product and Services

Table 68. Robots & Design C Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 69. Robots & Design C Recent Developments/Updates

Table 70. Hyundai Robotics Basic Information, Manufacturing Base and Competitors

Table 71. Hyundai Robotics Major Business

Table 72. Hyundai Robotics Glass Substrate Transfer Robot Product and Services

Table 73. Hyundai Robotics Glass Substrate Transfer Robot Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 74. Hyundai Robotics Recent Developments/Updates

Table 75. Global Glass Substrate Transfer Robot Sales Quantity by Manufacturer (2021-2026) & (Units)

- Table 76. Global Glass Substrate Transfer Robot Revenue by Manufacturer (2021-2026) & (USD Million)
- Table 77. Global Glass Substrate Transfer Robot Average Price by Manufacturer (2021-2026) & (K US\$/Unit)
- Table 78. Market Position of Manufacturers in Glass Substrate Transfer Robot, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
- Table 79. Head Office and Glass Substrate Transfer Robot Production Site of Key Manufacturer
- Table 80. Glass Substrate Transfer Robot Market: Company Product Type Footprint
- Table 81. Glass Substrate Transfer Robot Market: Company Product Application Footprint
- Table 82. Glass Substrate Transfer Robot New Market Entrants and Barriers to Market Entry
- Table 83. Glass Substrate Transfer Robot Mergers, Acquisition, Agreements, and Collaborations
- Table 84. Global Glass Substrate Transfer Robot Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
- Table 85. Global Glass Substrate Transfer Robot Sales Quantity by Region (2021-2026) & (Units)
- Table 86. Global Glass Substrate Transfer Robot Sales Quantity by Region (2027-2032) & (Units)
- Table 87. Global Glass Substrate Transfer Robot Consumption Value by Region (2021-2026) & (USD Million)
- Table 88. Global Glass Substrate Transfer Robot Consumption Value by Region (2027-2032) & (USD Million)
- Table 89. Global Glass Substrate Transfer Robot Average Price by Region (2021-2026) & (K US\$/Unit)
- Table 90. Global Glass Substrate Transfer Robot Average Price by Region (2027-2032) & (K US\$/Unit)
- Table 91. Global Glass Substrate Transfer Robot Sales Quantity by Type (2021-2026) & (Units)
- Table 92. Global Glass Substrate Transfer Robot Sales Quantity by Type (2027-2032) & (Units)
- Table 93. Global Glass Substrate Transfer Robot Consumption Value by Type (2021-2026) & (USD Million)
- Table 94. Global Glass Substrate Transfer Robot Consumption Value by Type (2027-2032) & (USD Million)
- Table 95. Global Glass Substrate Transfer Robot Average Price by Type (2021-2026) & (K US\$/Unit)

Table 96. Global Glass Substrate Transfer Robot Average Price by Type (2027-2032) & (K US\$/Unit)

Table 97. Global Glass Substrate Transfer Robot Sales Quantity by Application (2021-2026) & (Units)

Table 98. Global Glass Substrate Transfer Robot Sales Quantity by Application (2027-2032) & (Units)

Table 99. Global Glass Substrate Transfer Robot Consumption Value by Application (2021-2026) & (USD Million)

Table 100. Global Glass Substrate Transfer Robot Consumption Value by Application (2027-2032) & (USD Million)

Table 101. Global Glass Substrate Transfer Robot Average Price by Application (2021-2026) & (K US\$/Unit)

Table 102. Global Glass Substrate Transfer Robot Average Price by Application (2027-2032) & (K US\$/Unit)

Table 103. North America Glass Substrate Transfer Robot Sales Quantity by Type (2021-2026) & (Units)

Table 104. North America Glass Substrate Transfer Robot Sales Quantity by Type (2027-2032) & (Units)

Table 105. North America Glass Substrate Transfer Robot Sales Quantity by Application (2021-2026) & (Units)

Table 106. North America Glass Substrate Transfer Robot Sales Quantity by Application (2027-2032) & (Units)

Table 107. North America Glass Substrate Transfer Robot Sales Quantity by Country (2021-2026) & (Units)

Table 108. North America Glass Substrate Transfer Robot Sales Quantity by Country (2027-2032) & (Units)

Table 109. North America Glass Substrate Transfer Robot Consumption Value by Country (2021-2026) & (USD Million)

Table 110. North America Glass Substrate Transfer Robot Consumption Value by Country (2027-2032) & (USD Million)

Table 111. Europe Glass Substrate Transfer Robot Sales Quantity by Type (2021-2026) & (Units)

Table 112. Europe Glass Substrate Transfer Robot Sales Quantity by Type (2027-2032) & (Units)

Table 113. Europe Glass Substrate Transfer Robot Sales Quantity by Application (2021-2026) & (Units)

Table 114. Europe Glass Substrate Transfer Robot Sales Quantity by Application (2027-2032) & (Units)

Table 115. Europe Glass Substrate Transfer Robot Sales Quantity by Country

(2021-2026) & (Units)

Table 116. Europe Glass Substrate Transfer Robot Sales Quantity by Country

(2027-2032) & (Units)

Table 117. Europe Glass Substrate Transfer Robot Consumption Value by Country

(2021-2026) & (USD Million)

Table 118. Europe Glass Substrate Transfer Robot Consumption Value by Country

(2027-2032) & (USD Million)

Table 119. Asia-Pacific Glass Substrate Transfer Robot Sales Quantity by Type

(2021-2026) & (Units)

Table 120. Asia-Pacific Glass Substrate Transfer Robot Sales Quantity by Type

(2027-2032) & (Units)

Table 121. Asia-Pacific Glass Substrate Transfer Robot Sales Quantity by Application

(2021-2026) & (Units)

Table 122. Asia-Pacific Glass Substrate Transfer Robot Sales Quantity by Application

(2027-2032) & (Units)

Table 123. Asia-Pacific Glass Substrate Transfer Robot Sales Quantity by Region

(2021-2026) & (Units)

Table 124. Asia-Pacific Glass Substrate Transfer Robot Sales Quantity by Region

(2027-2032) & (Units)

Table 125. Asia-Pacific Glass Substrate Transfer Robot Consumption Value by Region

(2021-2026) & (USD Million)

Table 126. Asia-Pacific Glass Substrate Transfer Robot Consumption Value by Region

(2027-2032) & (USD Million)

Table 127. South America Glass Substrate Transfer Robot Sales Quantity by Type

(2021-2026) & (Units)

Table 128. South America Glass Substrate Transfer Robot Sales Quantity by Type

(2027-2032) & (Units)

Table 129. South America Glass Substrate Transfer Robot Sales Quantity by

Application (2021-2026) & (Units)

Table 130. South America Glass Substrate Transfer Robot Sales Quantity by

Application (2027-2032) & (Units)

Table 131. South America Glass Substrate Transfer Robot Sales Quantity by Country

(2021-2026) & (Units)

Table 132. South America Glass Substrate Transfer Robot Sales Quantity by Country

(2027-2032) & (Units)

Table 133. South America Glass Substrate Transfer Robot Consumption Value by

Country (2021-2026) & (USD Million)

Table 134. South America Glass Substrate Transfer Robot Consumption Value by

Country (2027-2032) & (USD Million)

Table 135. Middle East & Africa Glass Substrate Transfer Robot Sales Quantity by Type (2021-2026) & (Units)

Table 136. Middle East & Africa Glass Substrate Transfer Robot Sales Quantity by Type (2027-2032) & (Units)

Table 137. Middle East & Africa Glass Substrate Transfer Robot Sales Quantity by Application (2021-2026) & (Units)

Table 138. Middle East & Africa Glass Substrate Transfer Robot Sales Quantity by Application (2027-2032) & (Units)

Table 139. Middle East & Africa Glass Substrate Transfer Robot Sales Quantity by Country (2021-2026) & (Units)

Table 140. Middle East & Africa Glass Substrate Transfer Robot Sales Quantity by Country (2027-2032) & (Units)

Table 141. Middle East & Africa Glass Substrate Transfer Robot Consumption Value by Country (2021-2026) & (USD Million)

Table 142. Middle East & Africa Glass Substrate Transfer Robot Consumption Value by Country (2027-2032) & (USD Million)

Table 143. Glass Substrate Transfer Robot Raw Material

Table 144. Key Manufacturers of Glass Substrate Transfer Robot Raw Materials

Table 145. Glass Substrate Transfer Robot Typical Distributors

Table 146. Glass Substrate Transfer Robot Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Glass Substrate Transfer Robot Picture

Figure 2. Global Glass Substrate Transfer Robot Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global Glass Substrate Transfer Robot Revenue Market Share by Type in 2025

Figure 4. Single Arm Examples

Figure 5. Double Arm Examples

Figure 6. Other Examples

Figure 7. Global Glass Substrate Transfer Robot Revenue by Operating Environment, (USD Million), 2021 & 2025 & 2032

Figure 8. Global Glass Substrate Transfer Robot Revenue Market Share by Operating Environment in 2025

Figure 9. Vacuum Room Examples

Figure 10. Atmospheric Room Examples

Figure 11. Global Glass Substrate Transfer Robot Revenue by Generation, (USD Million), 2021 & 2025 & 2032

Figure 12. Global Glass Substrate Transfer Robot Revenue Market Share by Generation in 2025

Figure 13. 3.5-5.5 Gen Examples

Figure 14. 6-10.5 Gen Examples

Figure 15. Global Glass Substrate Transfer Robot Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 16. Global Glass Substrate Transfer Robot Revenue Market Share by Application in 2025

Figure 17. LCDs Examples

Figure 18. OLEDs Examples

Figure 19. Global Glass Substrate Transfer Robot Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 20. Global Glass Substrate Transfer Robot Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 21. Global Glass Substrate Transfer Robot Sales Quantity (2021-2032) & (Units)

Figure 22. Global Glass Substrate Transfer Robot Price (2021-2032) & (K US\$/Unit)

Figure 23. Global Glass Substrate Transfer Robot Sales Quantity Market Share by Manufacturer in 2025

Figure 24. Global Glass Substrate Transfer Robot Revenue Market Share by

Manufacturer in 2025

Figure 25. Producer Shipments of Glass Substrate Transfer Robot by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 26. Top 3 Glass Substrate Transfer Robot Manufacturer (Revenue) Market Share in 2025

Figure 27. Top 6 Glass Substrate Transfer Robot Manufacturer (Revenue) Market Share in 2025

Figure 28. Global Glass Substrate Transfer Robot Sales Quantity Market Share by Region (2021-2032)

Figure 29. Global Glass Substrate Transfer Robot Consumption Value Market Share by Region (2021-2032)

Figure 30. North America Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 31. Europe Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 32. Asia-Pacific Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 33. South America Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 34. Middle East & Africa Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 35. Global Glass Substrate Transfer Robot Sales Quantity Market Share by Type (2021-2032)

Figure 36. Global Glass Substrate Transfer Robot Consumption Value Market Share by Type (2021-2032)

Figure 37. Global Glass Substrate Transfer Robot Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 38. Global Glass Substrate Transfer Robot Sales Quantity Market Share by Application (2021-2032)

Figure 39. Global Glass Substrate Transfer Robot Revenue Market Share by Application (2021-2032)

Figure 40. Global Glass Substrate Transfer Robot Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 41. North America Glass Substrate Transfer Robot Sales Quantity Market Share by Type (2021-2032)

Figure 42. North America Glass Substrate Transfer Robot Sales Quantity Market Share by Application (2021-2032)

Figure 43. North America Glass Substrate Transfer Robot Sales Quantity Market Share by Country (2021-2032)

Figure 44. North America Glass Substrate Transfer Robot Consumption Value Market Share by Country (2021-2032)

Figure 45. United States Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 46. Canada Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 47. Mexico Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 48. Europe Glass Substrate Transfer Robot Sales Quantity Market Share by Type (2021-2032)

Figure 49. Europe Glass Substrate Transfer Robot Sales Quantity Market Share by Application (2021-2032)

Figure 50. Europe Glass Substrate Transfer Robot Sales Quantity Market Share by Country (2021-2032)

Figure 51. Europe Glass Substrate Transfer Robot Consumption Value Market Share by Country (2021-2032)

Figure 52. Germany Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 53. France Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 54. United Kingdom Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 55. Russia Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 56. Italy Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 57. Asia-Pacific Glass Substrate Transfer Robot Sales Quantity Market Share by Type (2021-2032)

Figure 58. Asia-Pacific Glass Substrate Transfer Robot Sales Quantity Market Share by Application (2021-2032)

Figure 59. Asia-Pacific Glass Substrate Transfer Robot Sales Quantity Market Share by Region (2021-2032)

Figure 60. Asia-Pacific Glass Substrate Transfer Robot Consumption Value Market Share by Region (2021-2032)

Figure 61. China Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 62. Japan Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 63. South Korea Glass Substrate Transfer Robot Consumption Value

(2021-2032) & (USD Million)

Figure 64. India Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 65. Southeast Asia Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 66. Australia Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 67. South America Glass Substrate Transfer Robot Sales Quantity Market Share by Type (2021-2032)

Figure 68. South America Glass Substrate Transfer Robot Sales Quantity Market Share by Application (2021-2032)

Figure 69. South America Glass Substrate Transfer Robot Sales Quantity Market Share by Country (2021-2032)

Figure 70. South America Glass Substrate Transfer Robot Consumption Value Market Share by Country (2021-2032)

Figure 71. Brazil Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 72. Argentina Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 73. Middle East & Africa Glass Substrate Transfer Robot Sales Quantity Market Share by Type (2021-2032)

Figure 74. Middle East & Africa Glass Substrate Transfer Robot Sales Quantity Market Share by Application (2021-2032)

Figure 75. Middle East & Africa Glass Substrate Transfer Robot Sales Quantity Market Share by Country (2021-2032)

Figure 76. Middle East & Africa Glass Substrate Transfer Robot Consumption Value Market Share by Country (2021-2032)

Figure 77. Turkey Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 78. Egypt Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 79. Saudi Arabia Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 80. South Africa Glass Substrate Transfer Robot Consumption Value (2021-2032) & (USD Million)

Figure 81. Glass Substrate Transfer Robot Market Drivers

Figure 82. Glass Substrate Transfer Robot Market Restraints

Figure 83. Glass Substrate Transfer Robot Market Trends

Figure 84. Porters Five Forces Analysis

Figure 85. Manufacturing Cost Structure Analysis of Glass Substrate Transfer Robot in 2025

Figure 86. Manufacturing Process Analysis of Glass Substrate Transfer Robot

Figure 87. Glass Substrate Transfer Robot Industrial Chain

Figure 88. Sales Channel: Direct to End-User vs Distributors

Figure 89. Direct Channel Pros & Cons

Figure 90. Indirect Channel Pros & Cons

Figure 91. Methodology

Figure 92. Research Process and Data Source

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