

Global Industrial Exoskeletons Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Industrial Exoskeletons market size is expected to reach \$ 1671 million by 2032, rising at a market growth of 27.3% CAGR during the forecast period (2026-2032). In 2025, the global production of Industrial Exoskeletons reached 11,900 units, with an average price of approximately US\$25,000 per unit and a gross profit margin of approximately 20.2%-50%. The average production line capacity was 250 units per company. Industrial exoskeletons are wearable devices designed to enhance human strength and endurance, especially in high-intensity, repetitive industrial jobs such as manufacturing, assembly, material handling, and logistics. Through mechanical support and assistive systems, they reduce the physical burden on workers, improve work efficiency, and reduce workplace injuries. Industrial exoskeletons typically use lightweight, high-strength materials such as aluminum alloys and carbon fiber, combined with a power system (such as electric or pneumatic drive) to provide auxiliary force, helping wearers to more easily perform heavy lifting and manual labor. With the development of automation and intelligent technologies, Industrial Exoskeletons are gradually becoming an important tool for improving productivity and protecting worker health.

Upstream: Raw Material and Core Component Supply. The lightweight structural materials, sensors, actuators, and power batteries required for Industrial Exoskeletons all rely on the upstream supply chain. In terms of structural materials, high-strength and lightweight alloys and composite materials, such as carbon fiber, titanium alloys, and aluminum alloys, are used to reduce the weight of the equipment and improve wearing comfort. Regarding sensors, these include inertial measurement units (IMUs) for posture and motion capture, pressure/torque sensors for detecting applied forces, and position encoders, enabling precise perception of human movement intentions and exoskeleton status. Typical suppliers include Bosch and Analog Devices (ADI) for MEMS inertial sensors, and ATI for force/torque sensors. For drive actuators, most

Industrial exoskeletons use motor-reducer drives, while a few employ hydraulic or pneumatic solutions. The required high-performance brushless motors, servo motors, and reducers are mainly supplied by specialized manufacturers (such as Maxon for high-power-density motors and Harmonic Drive for harmonic reducers), and these components determine the exoskeleton's power output and control precision. Furthermore, high-energy-density rechargeable batteries are crucial for powering exoskeleton mobility. Upstream battery suppliers include lithium-ion cell and module manufacturers (such as Panasonic, LG Chem, and CATL). Currently, hardware technologies such as motors and batteries are relatively mature, providing a reliable foundation for the practical application of exoskeletons.

Midstream: Core Module Development and Complete Machine Manufacturing. The midstream consists of exoskeleton manufacturers and system integrators, responsible for integrating various components into wearable devices and developing control algorithms to achieve human-machine collaboration. Core modules include:

- Control System** ? The brain of the exoskeleton, including the electronic control unit, drive circuits, and embedded software. This module integrates sensor data and controls the actuators of each joint in real time, requiring extremely high response speed and reliability. Leading companies typically develop their own controllers and operating software to ensure the safety and naturalness of human-machine interaction.
- Mechanical Structural Components** ? The skeleton of the exoskeleton, including support frames, joint mechanisms, connectors, and wearable fixation devices. Midstream manufacturers need to design ergonomic mechanical structures for different application scenarios, ensuring they are both robust and durable as well as lightweight and flexible.
- Algorithms and Software Modules** ? The core hardware and software that determine the intelligence level of the exoskeleton, including gait control, strength assistance algorithms, balance control, and human-machine interface. In recent years, artificial intelligence and machine learning have been introduced to adaptively adjust the exoskeleton's assistance level for different individuals and working conditions.

Industrial exoskeletons have a wide range of downstream applications, with major customers including manufacturing companies, logistics and warehousing enterprises, construction companies, and military departments.

Manufacturing: On production lines in manufacturing industries such as automobiles, aerospace, and electronics assembly, workers are prone to musculoskeletal strain due to prolonged assembly, lifting, and high-altitude operations. Exoskeletons can provide strength support and fatigue relief, improving productivity and reducing workplace injuries.

Logistics and Warehousing: In express delivery, warehousing, and distribution centers, handling and picking operations place a significant burden on workers' backs. Exoskeletons can help porters and couriers reduce the burden of heavy loads and lower the risk of injury, thereby improving work efficiency.

Construction: Construction sites are complex environments

requiring frequent handling of building materials and prolonged tool holding, leading to high levels of physical exertion and safety risks for workers. Exoskeletons can assist construction workers in lifting heavy objects, supporting their torsos, and stabilizing their bodies, reducing accidents caused by overexertion. With the increasing durability and protection levels of equipment, the construction industry is considered one of the key markets for exoskeletons in the future. Military and defense industry: The military field is one of the earliest birthplaces of exoskeleton technology. Military forces in many countries around the world have invested in the research and development of soldier-assistive exoskeletons and military exoskeleton equipment to enhance individual soldiers' ability to carry heavy loads and march, improve the efficiency of weapon handling and logistical support, etc.

Market Opportunities and Key Drivers: With rising labor costs, many manufacturing and logistics industries are seeking solutions to reduce worker workload and improve efficiency. Industrial exoskeletons can significantly reduce the health impact of repetitive manual labor, especially in high-load and hazardous work environments, providing employees with a more comfortable and safer way to work. Furthermore, with the increasing aging of the workforce, the demand for industrial exoskeletons is gradually increasing, especially in workplaces with older employees, where exoskeletons provide better support and extend their working life.

Market Challenges and Risks: Despite the enormous potential of industrial exoskeleton technology, significant challenges remain in its market adoption. First, technological maturity and cost remain major bottlenecks for the industry. High-performance exoskeleton systems are expensive, posing a considerable investment risk for many small and medium-sized enterprises. Second, product comfort and adaptability remain obstacles to industry development. Existing exoskeleton devices are generally heavy and require extended adaptation periods, causing inconvenience for some employees and impacting usability.

Downstream Demand Trends: As market demand for efficient work tools continues to grow, especially in manufacturing, logistics, and construction industries, the application of industrial exoskeletons will gradually become more widespread. In the future, companies will focus more on cost-effectiveness through increased productivity and reduced workplace injuries, and exoskeletons will be a key tool in achieving this goal. Furthermore, with governments and businesses placing greater emphasis on employee safety, supportive policies will help promote the adoption and market penetration of industrial exoskeletons, a trend expected to accelerate in the coming years.

This report studies the global Industrial Exoskeletons production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Industrial Exoskeletons 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 Industrial Exoskeletons that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Industrial Exoskeletons total production and demand, 2021-2032, (K Units)

Global Industrial Exoskeletons total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: Industrial Exoskeletons domestic production, consumption, key domestic manufacturers and share

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

Global Industrial Exoskeletons production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

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

This report profiles key players in the global Industrial Exoskeletons 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 Eksobionics, Cyberdyne, Sarcos Robotics, Novanta(Celera Motion), Lockheed Martin, Parker Hannifin, SUITX (Ottobock), Tmsuk, ExoAtlant, Raytheon, 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 Industrial Exoskeletons market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (K US\$/Unit) by manufacturer, by Type, 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 Industrial Exoskeletons Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Industrial Exoskeletons Market, Segmentation by Type:

Upper-body Exoskeletons

Lower-body Exoskeletons

Full-body Exoskeletons

Global Industrial Exoskeletons Market, Segmentation by Drive:

Electric Drive

Mechanical Drive

Hydraulic Drive

Global Industrial Exoskeletons Market, Segmentation by Sales:

Direct Sales

Distribution

Global Industrial Exoskeletons Market, Segmentation by Application:

Construction

Logistics and Warehousing

Manufacturing

Military and Defense

Other

Companies Profiled:

Eksobionics

Cyberdyne

Sarcos Robotics

Novanta(Celera Motion)

LockHeed Martin

Parker Hannifin

SUITX (Ottobock)

Tmsuk

ExoAtlant

Raytheon

Wearable Robotics Srl

RoboSuits

Comau

German Bionic

ANGEL ROBOTICS

German Bionic

ANGEL ROBOTICS

Panasonic

ULS Robotics

Shenzhen Kenqing Technology Co.,Ltd.

Jiangsu Zhenjiang New Energy Equipment Co., Ltd.

MileBot Robotics

Mabao Intelligent Technology(Suzhou)Co., Ltd.

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

- 1.1 Industrial Exoskeletons Introduction
- 1.2 World Industrial Exoskeletons Supply & Forecast
 - 1.2.1 World Industrial Exoskeletons Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Industrial Exoskeletons Production (2021-2032)
 - 1.2.3 World Industrial Exoskeletons Pricing Trends (2021-2032)
- 1.3 World Industrial Exoskeletons Production by Region (Based on Production Site)
 - 1.3.1 World Industrial Exoskeletons Production Value by Region (2021-2032)
 - 1.3.2 World Industrial Exoskeletons Production by Region (2021-2032)
 - 1.3.3 World Industrial Exoskeletons Average Price by Region (2021-2032)
 - 1.3.4 North America Industrial Exoskeletons Production (2021-2032)
 - 1.3.5 Europe Industrial Exoskeletons Production (2021-2032)
 - 1.3.6 China Industrial Exoskeletons Production (2021-2032)
 - 1.3.7 Japan Industrial Exoskeletons Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Industrial Exoskeletons Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Industrial Exoskeletons Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Industrial Exoskeletons Demand (2021-2032)
- 2.2 World Industrial Exoskeletons Consumption by Region
 - 2.2.1 World Industrial Exoskeletons Consumption by Region (2021-2026)
 - 2.2.2 World Industrial Exoskeletons Consumption Forecast by Region (2027-2032)
- 2.3 United States Industrial Exoskeletons Consumption (2021-2032)
- 2.4 China Industrial Exoskeletons Consumption (2021-2032)
- 2.5 Europe Industrial Exoskeletons Consumption (2021-2032)
- 2.6 Japan Industrial Exoskeletons Consumption (2021-2032)
- 2.7 South Korea Industrial Exoskeletons Consumption (2021-2032)
- 2.8 ASEAN Industrial Exoskeletons Consumption (2021-2032)
- 2.9 India Industrial Exoskeletons Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Industrial Exoskeletons Production Value by Manufacturer (2021-2026)

- 3.2 World Industrial Exoskeletons Production by Manufacturer (2021-2026)
- 3.3 World Industrial Exoskeletons Average Price by Manufacturer (2021-2026)
- 3.4 Industrial Exoskeletons Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Industrial Exoskeletons Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Industrial Exoskeletons in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Industrial Exoskeletons in 2025
- 3.6 Industrial Exoskeletons Market: Overall Company Footprint Analysis
 - 3.6.1 Industrial Exoskeletons Market: Region Footprint
 - 3.6.2 Industrial Exoskeletons Market: Company Product Type Footprint
 - 3.6.3 Industrial Exoskeletons Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Industrial Exoskeletons Production Value Comparison
 - 4.1.1 United States VS China: Industrial Exoskeletons Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Industrial Exoskeletons Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Industrial Exoskeletons Production Comparison
 - 4.2.1 United States VS China: Industrial Exoskeletons Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Industrial Exoskeletons Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Industrial Exoskeletons Consumption Comparison
 - 4.3.1 United States VS China: Industrial Exoskeletons Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Industrial Exoskeletons Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Industrial Exoskeletons Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Industrial Exoskeletons Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Industrial Exoskeletons Production Value (2021-2026)

4.4.3 United States Based Manufacturers Industrial Exoskeletons Production (2021-2026)

4.5 China Based Industrial Exoskeletons Manufacturers and Market Share

4.5.1 China Based Industrial Exoskeletons Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Industrial Exoskeletons Production Value (2021-2026)

4.5.3 China Based Manufacturers Industrial Exoskeletons Production (2021-2026)

4.6 Rest of World Based Industrial Exoskeletons Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Industrial Exoskeletons Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Industrial Exoskeletons Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Industrial Exoskeletons Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Industrial Exoskeletons Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Upper-body Exoskeletons

5.2.2 Lower-body Exoskeletons

5.2.3 Full-body Exoskeletons

5.3 Market Segment by Type

5.3.1 World Industrial Exoskeletons Production by Type (2021-2032)

5.3.2 World Industrial Exoskeletons Production Value by Type (2021-2032)

5.3.3 World Industrial Exoskeletons Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY DRIVE

6.1 World Industrial Exoskeletons Market Size Overview by Drive: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Drive

6.2.1 Electric Drive

6.2.2 Mechanical Drive

6.2.3 Hydraulic Drive

6.3 Market Segment by Drive

6.3.1 World Industrial Exoskeletons Production by Drive (2021-2032)

6.3.2 World Industrial Exoskeletons Production Value by Drive (2021-2032)

6.3.3 World Industrial Exoskeletons Average Price by Drive (2021-2032)

7 MARKET ANALYSIS BY SALES

7.1 World Industrial Exoskeletons Market Size Overview by Sales: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Sales

7.2.1 Direct Sales

7.2.2 Distribution

7.3 Market Segment by Sales

7.3.1 World Industrial Exoskeletons Production by Sales (2021-2032)

7.3.2 World Industrial Exoskeletons Production Value by Sales (2021-2032)

7.3.3 World Industrial Exoskeletons Average Price by Sales (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Industrial Exoskeletons Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Construction

8.2.2 Logistics and Warehousing

8.2.3 Manufacturing

8.2.4 Military and Defense

8.2.5 Other

8.3 Market Segment by Application

8.3.1 World Industrial Exoskeletons Production by Application (2021-2032)

8.3.2 World Industrial Exoskeletons Production Value by Application (2021-2032)

8.3.3 World Industrial Exoskeletons Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Eksobionics

9.1.1 Eksobionics Details

9.1.2 Eksobionics Major Business

9.1.3 Eksobionics Industrial Exoskeletons Product and Services

9.1.4 Eksobionics Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Eksobionics Recent Developments/Updates

9.1.6 Eksobionics Competitive Strengths & Weaknesses

9.2 Cyberdyne

9.2.1 Cyberdyne Details

9.2.2 Cyberdyne Major Business

9.2.3 Cyberdyne Industrial Exoskeletons Product and Services

9.2.4 Cyberdyne Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Cyberdyne Recent Developments/Updates

9.2.6 Cyberdyne Competitive Strengths & Weaknesses

9.3 Sarcos Robotics

9.3.1 Sarcos Robotics Details

9.3.2 Sarcos Robotics Major Business

9.3.3 Sarcos Robotics Industrial Exoskeletons Product and Services

9.3.4 Sarcos Robotics Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Sarcos Robotics Recent Developments/Updates

9.3.6 Sarcos Robotics Competitive Strengths & Weaknesses

9.4 Novanta(Celera Motion)

9.4.1 Novanta(Celera Motion) Details

9.4.2 Novanta(Celera Motion) Major Business

9.4.3 Novanta(Celera Motion) Industrial Exoskeletons Product and Services

9.4.4 Novanta(Celera Motion) Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Novanta(Celera Motion) Recent Developments/Updates

9.4.6 Novanta(Celera Motion) Competitive Strengths & Weaknesses

9.5 LockHeed Martin

9.5.1 LockHeed Martin Details

9.5.2 LockHeed Martin Major Business

9.5.3 LockHeed Martin Industrial Exoskeletons Product and Services

9.5.4 LockHeed Martin Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 LockHeed Martin Recent Developments/Updates

9.5.6 LockHeed Martin Competitive Strengths & Weaknesses

9.6 Parker Hannifin

9.6.1 Parker Hannifin Details

9.6.2 Parker Hannifin Major Business

- 9.6.3 Parker Hannifin Industrial Exoskeletons Product and Services
- 9.6.4 Parker Hannifin Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 Parker Hannifin Recent Developments/Updates
- 9.6.6 Parker Hannifin Competitive Strengths & Weaknesses
- 9.7 SUITX (Ottobock)
 - 9.7.1 SUITX (Ottobock) Details
 - 9.7.2 SUITX (Ottobock) Major Business
 - 9.7.3 SUITX (Ottobock) Industrial Exoskeletons Product and Services
 - 9.7.4 SUITX (Ottobock) Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 SUITX (Ottobock) Recent Developments/Updates
 - 9.7.6 SUITX (Ottobock) Competitive Strengths & Weaknesses
- 9.8 Tmsuk
 - 9.8.1 Tmsuk Details
 - 9.8.2 Tmsuk Major Business
 - 9.8.3 Tmsuk Industrial Exoskeletons Product and Services
 - 9.8.4 Tmsuk Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Tmsuk Recent Developments/Updates
 - 9.8.6 Tmsuk Competitive Strengths & Weaknesses
- 9.9 ExoAtlant
 - 9.9.1 ExoAtlant Details
 - 9.9.2 ExoAtlant Major Business
 - 9.9.3 ExoAtlant Industrial Exoskeletons Product and Services
 - 9.9.4 ExoAtlant Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 ExoAtlant Recent Developments/Updates
 - 9.9.6 ExoAtlant Competitive Strengths & Weaknesses
- 9.10 Raytheon
 - 9.10.1 Raytheon Details
 - 9.10.2 Raytheon Major Business
 - 9.10.3 Raytheon Industrial Exoskeletons Product and Services
 - 9.10.4 Raytheon Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Raytheon Recent Developments/Updates
 - 9.10.6 Raytheon Competitive Strengths & Weaknesses
- 9.11 Wearable Robotics Srl
 - 9.11.1 Wearable Robotics Srl Details

- 9.11.2 Wearable Robotics Srl Major Business
- 9.11.3 Wearable Robotics Srl Industrial Exoskeletons Product and Services
- 9.11.4 Wearable Robotics Srl Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 Wearable Robotics Srl Recent Developments/Updates
- 9.11.6 Wearable Robotics Srl Competitive Strengths & Weaknesses
- 9.12 RoboSuits
 - 9.12.1 RoboSuits Details
 - 9.12.2 RoboSuits Major Business
 - 9.12.3 RoboSuits Industrial Exoskeletons Product and Services
 - 9.12.4 RoboSuits Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 RoboSuits Recent Developments/Updates
 - 9.12.6 RoboSuits Competitive Strengths & Weaknesses
- 9.13 Comau
 - 9.13.1 Comau Details
 - 9.13.2 Comau Major Business
 - 9.13.3 Comau Industrial Exoskeletons Product and Services
 - 9.13.4 Comau Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Comau Recent Developments/Updates
 - 9.13.6 Comau Competitive Strengths & Weaknesses
- 9.14 German Bionic
 - 9.14.1 German Bionic Details
 - 9.14.2 German Bionic Major Business
 - 9.14.3 German Bionic Industrial Exoskeletons Product and Services
 - 9.14.4 German Bionic Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 German Bionic Recent Developments/Updates
 - 9.14.6 German Bionic Competitive Strengths & Weaknesses
- 9.15 ANGEL ROBOTICS
 - 9.15.1 ANGEL ROBOTICS Details
 - 9.15.2 ANGEL ROBOTICS Major Business
 - 9.15.3 ANGEL ROBOTICS Industrial Exoskeletons Product and Services
 - 9.15.4 ANGEL ROBOTICS Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 ANGEL ROBOTICS Recent Developments/Updates
 - 9.15.6 ANGEL ROBOTICS Competitive Strengths & Weaknesses
- 9.16 German Bionic

- 9.16.1 German Bionic Details
- 9.16.2 German Bionic Major Business
- 9.16.3 German Bionic Industrial Exoskeletons Product and Services
- 9.16.4 German Bionic Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.16.5 German Bionic Recent Developments/Updates
- 9.16.6 German Bionic Competitive Strengths & Weaknesses
- 9.17 ANGEL ROBOTICS
 - 9.17.1 ANGEL ROBOTICS Details
 - 9.17.2 ANGEL ROBOTICS Major Business
 - 9.17.3 ANGEL ROBOTICS Industrial Exoskeletons Product and Services
 - 9.17.4 ANGEL ROBOTICS Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.17.5 ANGEL ROBOTICS Recent Developments/Updates
 - 9.17.6 ANGEL ROBOTICS Competitive Strengths & Weaknesses
- 9.18 Panasonic
 - 9.18.1 Panasonic Details
 - 9.18.2 Panasonic Major Business
 - 9.18.3 Panasonic Industrial Exoskeletons Product and Services
 - 9.18.4 Panasonic Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.18.5 Panasonic Recent Developments/Updates
 - 9.18.6 Panasonic Competitive Strengths & Weaknesses
- 9.19 ULS Robotics
 - 9.19.1 ULS Robotics Details
 - 9.19.2 ULS Robotics Major Business
 - 9.19.3 ULS Robotics Industrial Exoskeletons Product and Services
 - 9.19.4 ULS Robotics Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.19.5 ULS Robotics Recent Developments/Updates
 - 9.19.6 ULS Robotics Competitive Strengths & Weaknesses
- 9.20 Shenzhen Kenqing Technology Co.,Ltd.
 - 9.20.1 Shenzhen Kenqing Technology Co.,Ltd. Details
 - 9.20.2 Shenzhen Kenqing Technology Co.,Ltd. Major Business
 - 9.20.3 Shenzhen Kenqing Technology Co.,Ltd. Industrial Exoskeletons Product and Services
 - 9.20.4 Shenzhen Kenqing Technology Co.,Ltd. Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.20.5 Shenzhen Kenqing Technology Co.,Ltd. Recent Developments/Updates

- 9.20.6 Shenzhen Kenqing Technology Co.,Ltd. Competitive Strengths & Weaknesses
- 9.21 Jiangsu Zhenjiang New Energy Equipment Co., Ltd.
 - 9.21.1 Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Details
 - 9.21.2 Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Major Business
 - 9.21.3 Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Industrial Exoskeletons Product and Services
 - 9.21.4 Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.21.5 Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Recent Developments/Updates
 - 9.21.6 Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Competitive Strengths & Weaknesses
- 9.22 MileBot Robotics
 - 9.22.1 MileBot Robotics Details
 - 9.22.2 MileBot Robotics Major Business
 - 9.22.3 MileBot Robotics Industrial Exoskeletons Product and Services
 - 9.22.4 MileBot Robotics Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.22.5 MileBot Robotics Recent Developments/Updates
 - 9.22.6 MileBot Robotics Competitive Strengths & Weaknesses
- 9.23 Mabao Intelligent Technology(Suzhou)Co., Ltd.
 - 9.23.1 Mabao Intelligent Technology(Suzhou)Co., Ltd. Details
 - 9.23.2 Mabao Intelligent Technology(Suzhou)Co., Ltd. Major Business
 - 9.23.3 Mabao Intelligent Technology(Suzhou)Co., Ltd. Industrial Exoskeletons Product and Services
 - 9.23.4 Mabao Intelligent Technology(Suzhou)Co., Ltd. Industrial Exoskeletons Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.23.5 Mabao Intelligent Technology(Suzhou)Co., Ltd. Recent Developments/Updates
 - 9.23.6 Mabao Intelligent Technology(Suzhou)Co., Ltd. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Industrial Exoskeletons Industry Chain
- 10.2 Industrial Exoskeletons Upstream Analysis
 - 10.2.1 Industrial Exoskeletons Core Raw Materials
 - 10.2.2 Main Manufacturers of Industrial Exoskeletons Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis

10.5 Industrial Exoskeletons Production Mode

10.6 Industrial Exoskeletons Procurement Model

10.7 Industrial Exoskeletons Industry Sales Model and Sales Channels

10.7.1 Industrial Exoskeletons Sales Model

10.7.2 Industrial Exoskeletons Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Industrial Exoskeletons Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Industrial Exoskeletons Production Value by Region (2021-2026) & (USD Million)

Table 3. World Industrial Exoskeletons Production Value by Region (2027-2032) & (USD Million)

Table 4. World Industrial Exoskeletons Production Value Market Share by Region (2021-2026)

Table 5. World Industrial Exoskeletons Production Value Market Share by Region (2027-2032)

Table 6. World Industrial Exoskeletons Production by Region (2021-2026) & (K Units)

Table 7. World Industrial Exoskeletons Production by Region (2027-2032) & (K Units)

Table 8. World Industrial Exoskeletons Production Market Share by Region (2021-2026)

Table 9. World Industrial Exoskeletons Production Market Share by Region (2027-2032)

Table 10. World Industrial Exoskeletons Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World Industrial Exoskeletons Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. Industrial Exoskeletons Major Market Trends

Table 13. World Industrial Exoskeletons Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Industrial Exoskeletons Consumption by Region (2021-2026) & (K Units)

Table 15. World Industrial Exoskeletons Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Industrial Exoskeletons Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Industrial Exoskeletons Producers in 2025

Table 18. World Industrial Exoskeletons Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Industrial Exoskeletons Producers in 2025

Table 20. World Industrial Exoskeletons Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Industrial Exoskeletons Company Evaluation Quadrant

Table 22. World Industrial Exoskeletons Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Industrial Exoskeletons Production Site of Key Manufacturer

Table 24. Industrial Exoskeletons Market: Company Product Type Footprint

Table 25. Industrial Exoskeletons Market: Company Product Application Footprint

Table 26. Industrial Exoskeletons Competitive Factors

Table 27. Industrial Exoskeletons New Entrant and Capacity Expansion Plans

Table 28. Industrial Exoskeletons Mergers & Acquisitions Activity

Table 29. United States VS China Industrial Exoskeletons Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Industrial Exoskeletons Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Industrial Exoskeletons Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Industrial Exoskeletons Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Industrial Exoskeletons Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Industrial Exoskeletons Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Industrial Exoskeletons Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Industrial Exoskeletons Production Market Share (2021-2026)

Table 37. China Based Industrial Exoskeletons Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Industrial Exoskeletons Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Industrial Exoskeletons Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Industrial Exoskeletons Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Industrial Exoskeletons Production Market Share (2021-2026)

Table 42. Rest of World Based Industrial Exoskeletons Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Industrial Exoskeletons Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Industrial Exoskeletons Production Value

Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Industrial Exoskeletons Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Industrial Exoskeletons Production Market Share (2021-2026)

Table 47. World Industrial Exoskeletons Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Industrial Exoskeletons Production by Type (2021-2026) & (K Units)

Table 49. World Industrial Exoskeletons Production by Type (2027-2032) & (K Units)

Table 50. World Industrial Exoskeletons Production Value by Type (2021-2026) & (USD Million)

Table 51. World Industrial Exoskeletons Production Value by Type (2027-2032) & (USD Million)

Table 52. World Industrial Exoskeletons Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World Industrial Exoskeletons Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World Industrial Exoskeletons Production Value by Drive, (USD Million), 2021 & 2025 & 2032

Table 55. World Industrial Exoskeletons Production by Drive (2021-2026) & (K Units)

Table 56. World Industrial Exoskeletons Production by Drive (2027-2032) & (K Units)

Table 57. World Industrial Exoskeletons Production Value by Drive (2021-2026) & (USD Million)

Table 58. World Industrial Exoskeletons Production Value by Drive (2027-2032) & (USD Million)

Table 59. World Industrial Exoskeletons Average Price by Drive (2021-2026) & (K US\$/Unit)

Table 60. World Industrial Exoskeletons Average Price by Drive (2027-2032) & (K US\$/Unit)

Table 61. World Industrial Exoskeletons Production Value by Sales, (USD Million), 2021 & 2025 & 2032

Table 62. World Industrial Exoskeletons Production by Sales (2021-2026) & (K Units)

Table 63. World Industrial Exoskeletons Production by Sales (2027-2032) & (K Units)

Table 64. World Industrial Exoskeletons Production Value by Sales (2021-2026) & (USD Million)

Table 65. World Industrial Exoskeletons Production Value by Sales (2027-2032) & (USD Million)

Table 66. World Industrial Exoskeletons Average Price by Sales (2021-2026) & (K US\$/Unit)

Table 67. World Industrial Exoskeletons Average Price by Sales (2027-2032) & (K US\$/Unit)

Table 68. World Industrial Exoskeletons Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Industrial Exoskeletons Production by Application (2021-2026) & (K Units)

Table 70. World Industrial Exoskeletons Production by Application (2027-2032) & (K Units)

Table 71. World Industrial Exoskeletons Production Value by Application (2021-2026) & (USD Million)

Table 72. World Industrial Exoskeletons Production Value by Application (2027-2032) & (USD Million)

Table 73. World Industrial Exoskeletons Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World Industrial Exoskeletons Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. Eksobionics Basic Information, Manufacturing Base and Competitors

Table 76. Eksobionics Major Business

Table 77. Eksobionics Industrial Exoskeletons Product and Services

Table 78. Eksobionics Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Eksobionics Recent Developments/Updates

Table 80. Eksobionics Competitive Strengths & Weaknesses

Table 81. Cyberdyne Basic Information, Manufacturing Base and Competitors

Table 82. Cyberdyne Major Business

Table 83. Cyberdyne Industrial Exoskeletons Product and Services

Table 84. Cyberdyne Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Cyberdyne Recent Developments/Updates

Table 86. Cyberdyne Competitive Strengths & Weaknesses

Table 87. Sarcos Robotics Basic Information, Manufacturing Base and Competitors

Table 88. Sarcos Robotics Major Business

Table 89. Sarcos Robotics Industrial Exoskeletons Product and Services

Table 90. Sarcos Robotics Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Sarcos Robotics Recent Developments/Updates

Table 92. Sarcos Robotics Competitive Strengths & Weaknesses

Table 93. Novanta(Celera Motion) Basic Information, Manufacturing Base and

Competitors

Table 94. Novanta(Celera Motion) Major Business

Table 95. Novanta(Celera Motion) Industrial Exoskeletons Product and Services

Table 96. Novanta(Celera Motion) Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Novanta(Celera Motion) Recent Developments/Updates

Table 98. Novanta(Celera Motion) Competitive Strengths & Weaknesses

Table 99. LockHeed Martin Basic Information, Manufacturing Base and Competitors

Table 100. LockHeed Martin Major Business

Table 101. LockHeed Martin Industrial Exoskeletons Product and Services

Table 102. LockHeed Martin Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. LockHeed Martin Recent Developments/Updates

Table 104. LockHeed Martin Competitive Strengths & Weaknesses

Table 105. Parker Hannifin Basic Information, Manufacturing Base and Competitors

Table 106. Parker Hannifin Major Business

Table 107. Parker Hannifin Industrial Exoskeletons Product and Services

Table 108. Parker Hannifin Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Parker Hannifin Recent Developments/Updates

Table 110. Parker Hannifin Competitive Strengths & Weaknesses

Table 111. SUITX (Ottobock) Basic Information, Manufacturing Base and Competitors

Table 112. SUITX (Ottobock) Major Business

Table 113. SUITX (Ottobock) Industrial Exoskeletons Product and Services

Table 114. SUITX (Ottobock) Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. SUITX (Ottobock) Recent Developments/Updates

Table 116. SUITX (Ottobock) Competitive Strengths & Weaknesses

Table 117. Tmsuk Basic Information, Manufacturing Base and Competitors

Table 118. Tmsuk Major Business

Table 119. Tmsuk Industrial Exoskeletons Product and Services

Table 120. Tmsuk Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Tmsuk Recent Developments/Updates

Table 122. Tmsuk Competitive Strengths & Weaknesses

- Table 123. ExoAtlant Basic Information, Manufacturing Base and Competitors
- Table 124. ExoAtlant Major Business
- Table 125. ExoAtlant Industrial Exoskeletons Product and Services
- Table 126. ExoAtlant Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. ExoAtlant Recent Developments/Updates
- Table 128. ExoAtlant Competitive Strengths & Weaknesses
- Table 129. Raytheon Basic Information, Manufacturing Base and Competitors
- Table 130. Raytheon Major Business
- Table 131. Raytheon Industrial Exoskeletons Product and Services
- Table 132. Raytheon Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. Raytheon Recent Developments/Updates
- Table 134. Raytheon Competitive Strengths & Weaknesses
- Table 135. Wearable Robotics Srl Basic Information, Manufacturing Base and Competitors
- Table 136. Wearable Robotics Srl Major Business
- Table 137. Wearable Robotics Srl Industrial Exoskeletons Product and Services
- Table 138. Wearable Robotics Srl Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Wearable Robotics Srl Recent Developments/Updates
- Table 140. Wearable Robotics Srl Competitive Strengths & Weaknesses
- Table 141. RoboSuits Basic Information, Manufacturing Base and Competitors
- Table 142. RoboSuits Major Business
- Table 143. RoboSuits Industrial Exoskeletons Product and Services
- Table 144. RoboSuits Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. RoboSuits Recent Developments/Updates
- Table 146. RoboSuits Competitive Strengths & Weaknesses
- Table 147. Comau Basic Information, Manufacturing Base and Competitors
- Table 148. Comau Major Business
- Table 149. Comau Industrial Exoskeletons Product and Services
- Table 150. Comau Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. Comau Recent Developments/Updates
- Table 152. Comau Competitive Strengths & Weaknesses
- Table 153. German Bionic Basic Information, Manufacturing Base and Competitors
- Table 154. German Bionic Major Business

- Table 155. German Bionic Industrial Exoskeletons Product and Services
- Table 156. German Bionic Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 157. German Bionic Recent Developments/Updates
- Table 158. German Bionic Competitive Strengths & Weaknesses
- Table 159. ANGEL ROBOTICS Basic Information, Manufacturing Base and Competitors
- Table 160. ANGEL ROBOTICS Major Business
- Table 161. ANGEL ROBOTICS Industrial Exoskeletons Product and Services
- Table 162. ANGEL ROBOTICS Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 163. ANGEL ROBOTICS Recent Developments/Updates
- Table 164. ANGEL ROBOTICS Competitive Strengths & Weaknesses
- Table 165. German Bionic Basic Information, Manufacturing Base and Competitors
- Table 166. German Bionic Major Business
- Table 167. German Bionic Industrial Exoskeletons Product and Services
- Table 168. German Bionic Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 169. German Bionic Recent Developments/Updates
- Table 170. German Bionic Competitive Strengths & Weaknesses
- Table 171. ANGEL ROBOTICS Basic Information, Manufacturing Base and Competitors
- Table 172. ANGEL ROBOTICS Major Business
- Table 173. ANGEL ROBOTICS Industrial Exoskeletons Product and Services
- Table 174. ANGEL ROBOTICS Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 175. ANGEL ROBOTICS Recent Developments/Updates
- Table 176. ANGEL ROBOTICS Competitive Strengths & Weaknesses
- Table 177. Panasonic Basic Information, Manufacturing Base and Competitors
- Table 178. Panasonic Major Business
- Table 179. Panasonic Industrial Exoskeletons Product and Services
- Table 180. Panasonic Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 181. Panasonic Recent Developments/Updates
- Table 182. Panasonic Competitive Strengths & Weaknesses
- Table 183. ULS Robotics Basic Information, Manufacturing Base and Competitors
- Table 184. ULS Robotics Major Business

- Table 185. ULS Robotics Industrial Exoskeletons Product and Services
- Table 186. ULS Robotics Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 187. ULS Robotics Recent Developments/Updates
- Table 188. ULS Robotics Competitive Strengths & Weaknesses
- Table 189. Shenzhen Kenqing Technology Co.,Ltd. Basic Information, Manufacturing Base and Competitors
- Table 190. Shenzhen Kenqing Technology Co.,Ltd. Major Business
- Table 191. Shenzhen Kenqing Technology Co.,Ltd. Industrial Exoskeletons Product and Services
- Table 192. Shenzhen Kenqing Technology Co.,Ltd. Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 193. Shenzhen Kenqing Technology Co.,Ltd. Recent Developments/Updates
- Table 194. Shenzhen Kenqing Technology Co.,Ltd. Competitive Strengths & Weaknesses
- Table 195. Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Basic Information, Manufacturing Base and Competitors
- Table 196. Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Major Business
- Table 197. Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Industrial Exoskeletons Product and Services
- Table 198. Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 199. Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Recent Developments/Updates
- Table 200. Jiangsu Zhenjiang New Energy Equipment Co., Ltd. Competitive Strengths & Weaknesses
- Table 201. MileBot Robotics Basic Information, Manufacturing Base and Competitors
- Table 202. MileBot Robotics Major Business
- Table 203. MileBot Robotics Industrial Exoskeletons Product and Services
- Table 204. MileBot Robotics Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 205. MileBot Robotics Recent Developments/Updates
- Table 206. MileBot Robotics Competitive Strengths & Weaknesses
- Table 207. Mabao Intelligent Technology(Suzhou)Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 208. Mabao Intelligent Technology(Suzhou)Co., Ltd. Major Business

Table 209. Mabao Intelligent Technology(Suzhou)Co., Ltd. Industrial Exoskeletons Product and Services

Table 210. Mabao Intelligent Technology(Suzhou)Co., Ltd. Industrial Exoskeletons Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 211. Mabao Intelligent Technology(Suzhou)Co., Ltd. Recent Developments/Updates

Table 212. Mabao Intelligent Technology(Suzhou)Co., Ltd. Competitive Strengths & Weaknesses

Table 213. Global Key Players of Industrial Exoskeletons Upstream (Raw Materials)

Table 214. Global Industrial Exoskeletons Typical Customers

Table 215. Industrial Exoskeletons Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Industrial Exoskeletons Picture

Figure 2. World Industrial Exoskeletons Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Industrial Exoskeletons Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Industrial Exoskeletons Production (2021-2032) & (K Units)

Figure 5. World Industrial Exoskeletons Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Industrial Exoskeletons Production Value Market Share by Region (2021-2032)

Figure 7. World Industrial Exoskeletons Production Market Share by Region (2021-2032)

Figure 8. North America Industrial Exoskeletons Production (2021-2032) & (K Units)

Figure 9. Europe Industrial Exoskeletons Production (2021-2032) & (K Units)

Figure 10. China Industrial Exoskeletons Production (2021-2032) & (K Units)

Figure 11. Japan Industrial Exoskeletons Production (2021-2032) & (K Units)

Figure 12. Industrial Exoskeletons Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Industrial Exoskeletons Consumption (2021-2032) & (K Units)

Figure 15. World Industrial Exoskeletons Consumption Market Share by Region (2021-2032)

Figure 16. United States Industrial Exoskeletons Consumption (2021-2032) & (K Units)

Figure 17. China Industrial Exoskeletons Consumption (2021-2032) & (K Units)

Figure 18. Europe Industrial Exoskeletons Consumption (2021-2032) & (K Units)

Figure 19. Japan Industrial Exoskeletons Consumption (2021-2032) & (K Units)

Figure 20. South Korea Industrial Exoskeletons Consumption (2021-2032) & (K Units)

Figure 21. ASEAN Industrial Exoskeletons Consumption (2021-2032) & (K Units)

Figure 22. India Industrial Exoskeletons Consumption (2021-2032) & (K Units)

Figure 23. Producer Shipments of Industrial Exoskeletons by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Industrial Exoskeletons Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Industrial Exoskeletons Markets in 2025

Figure 26. United States VS China: Industrial Exoskeletons Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Industrial Exoskeletons Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Industrial Exoskeletons Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Industrial Exoskeletons Production Market Share 2025

Figure 30. China Based Manufacturers Industrial Exoskeletons Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Industrial Exoskeletons Production Market Share 2025

Figure 32. World Industrial Exoskeletons Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Industrial Exoskeletons Production Value Market Share by Type in 2025

Figure 34. Upper-body Exoskeletons

Figure 35. Lower-body Exoskeletons

Figure 36. Full-body Exoskeletons

Figure 37. World Industrial Exoskeletons Production Market Share by Type (2021-2032)

Figure 38. World Industrial Exoskeletons Production Value Market Share by Type (2021-2032)

Figure 39. World Industrial Exoskeletons Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 40. World Industrial Exoskeletons Production Value by Drive, (USD Million), 2021 & 2025 & 2032

Figure 41. World Industrial Exoskeletons Production Value Market Share by Drive in 2025

Figure 42. Electric Drive

Figure 43. Mechanical Drive

Figure 44. Hydraulic Drive

Figure 45. World Industrial Exoskeletons Production Market Share by Drive (2021-2032)

Figure 46. World Industrial Exoskeletons Production Value Market Share by Drive (2021-2032)

Figure 47. World Industrial Exoskeletons Average Price by Drive (2021-2032) & (K US\$/Unit)

Figure 48. World Industrial Exoskeletons Production Value by Sales, (USD Million), 2021 & 2025 & 2032

Figure 49. World Industrial Exoskeletons Production Value Market Share by Sales in 2025

Figure 50. Direct Sales

Figure 51. Distribution

Figure 52. World Industrial Exoskeletons Production Market Share by Sales
(2021-2032)

Figure 53. World Industrial Exoskeletons Production Value Market Share by Sales
(2021-2032)

Figure 54. World Industrial Exoskeletons Average Price by Sales (2021-2032) & (K
US\$/Unit)

Figure 55. World Industrial Exoskeletons Production Value by Application, (USD
Million), 2021 & 2025 & 2032

Figure 56. World Industrial Exoskeletons Production Value Market Share by Application
in 2025

Figure 57. Construction

Figure 58. Logistics and Warehousing

Figure 59. Manufacturing

Figure 60. Military and Defense

Figure 61. Other

Figure 62. World Industrial Exoskeletons Production Market Share by Application
(2021-2032)

Figure 63. World Industrial Exoskeletons Production Value Market Share by Application
(2021-2032)

Figure 64. World Industrial Exoskeletons Average Price by Application (2021-2032) & (K
US\$/Unit)

Figure 65. Industrial Exoskeletons Industry Chain

Figure 66. Industrial Exoskeletons Procurement Model

Figure 67. Industrial Exoskeletons Sales Model

Figure 68. Industrial Exoskeletons Sales Channels, Direct Sales, and Distribution

Figure 69. Methodology

Figure 70. Research Process and Data Source

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