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Global Inertial Measurement Units for Robotics Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Inertial Measurement Units for Robotics market size is expected to reach $ 1410 million by 2032, rising at a market growth of 13.5% CAGR during the forecast period (2026-2032).

Inertial Measurement Units for Robotics are sensing components used in industrial robots, mobile robots, service robots, humanoid robots, and other unmanned platforms to measure three-axis angular velocity and three-axis linear acceleration in real time and provide inertial data for attitude estimation, balance control, motion control, localization, and multi-sensor fusion. The market covers IMUs based primarily on MEMS, fiber-optic gyroscope, and ring laser gyroscope technologies, spanning IC/SiP devices, OEM modules, and self-contained enclosed units. Products can be differentiated by six-axis or nine-axis-and-above sensor configuration, gyroscope bias instability, and form factor. Core purchasing attributes include low noise and drift, bandwidth, latency, vibration robustness, temperature compensation, calibration consistency, and system interfaces such as SPI, UART, CAN, RS-422, and Ethernet. This study focuses on IMUs used for robot body-state sensing, AGV/AMR localization, unmanned-platform navigation, and motion control in medical and service robots, including integrated products that retain raw inertial-data output capability. The blended gross margin is approximately 45%.

Market Trends

Robotics IMUs are shifting from simple motion-sensing components toward calibrated, timing-aware inertial nodes designed to operate inside tightly coupled perception and control stacks. High-dynamic-range gyroscopes, lower noise, reduced vibration

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rectification error, tighter temperature compensation, lower latency, and faster output rates are becoming more important as mobile robots, unmanned platforms, and humanoids move faster and experience greater shock and vibration. Chip-level MEMS devices continue to improve through algorithms, packaging, and calibration, extending into use cases that previously required tactical or optical inertial devices. Fiber-optic solutions still retain an advantage where long-duration drift control, GNSS-denied navigation, and mission reliability justify higher cost. Timestamping, self-test, embedded processing, ROS compatibility, and standardized digital interfaces are also becoming major integration criteria. Humanoid designs add a further shift from one central IMU toward multiple synchronized sensors distributed across the torso and limbs.

Drivers

Continued deployment of industrial automation, warehouse logistics, unmanned systems, and service robots increases the baseline need for real-time attitude, angular-rate, and linear-acceleration measurements. As robots move from predefined trajectories toward autonomous navigation and dynamic balance, IMUs become more deeply embedded in localization fusion, closed-loop control, fall detection, motion compensation, and vision stabilization. Humanoid robots are particularly dependent on high-rate, low-latency inertial feedback and may use several IMUs per platform, increasing both sensor content and calibration requirements.

Restraints

Low-cost MEMS IMUs can still accumulate errors under temperature change, bias drift, strong vibration, and mechanical shock, requiring thermal compensation, structural isolation, and fusion with external sensors. High-stability modules and fiber-optic IMUs carry materially higher prices, limiting adoption in cost-sensitive platforms. Differences in vendor test conditions for bias instability, angle random walk, and dynamic error also make cross-platform benchmarking and substitution more difficult for robot OEMs.

Opportunities

Humanoids, multi-sensor AMRs, UAVs, and specialty robots create incremental demand for synchronized multi-IMU architectures, wider dynamic ranges, and higher reliability. Suppliers combining temperature calibration, precision timing, self-test, low-latency interfaces, and robotics software support are better positioned to win platform-

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level designs. Rapid expansion of the Chinese robotics supply chain also creates opportunities for suppliers with local calibration, fast delivery, and interface customization, while smaller FOG packages can penetrate high-value applications where GNSS availability is limited.

Challenges

Robot designers must continuously balance size, power, cost, dynamic range, and long-term stability, so leadership on a single specification does not guarantee system-level performance. Mounting location, structural vibration, thermal layout, and clock synchronization can materially change control results, requiring suppliers to provide stronger application validation and calibration support. High-end inertial products also face lengthy reliability qualification, process-yield challenges, and potential export or supply constraints for certain performance grades.

Industry Chain Analysis

Upstream inputs include MEMS gyroscope and accelerometer wafers, ASICs, package substrates, oscillators, magnetic sensors, optical fiber coils, light sources, photodetectors, connectors, and precision mechanical parts. Midstream suppliers integrate sensing elements, packaging, thermal calibration, error compensation, firmware, module assembly, and environmental qualification into IC/SiP devices, OEM modules, or enclosed IMUs. Downstream customers include robot OEMs, mobile-robot manufacturers, unmanned-system developers, controller suppliers, and system integrators. Value capture is not determined by the sensing die alone: full-temperature calibration, bias control, vibration suppression, timing accuracy, software interfaces, and long-term unit-to-unit consistency materially increase the value of industrial and tactical products. Fiber-optic IMUs add dependence on optical components, precision coil winding, and closed-loop control know-how.

Segment Insights

MEMS IMUs account for the majority of robotics unit shipments because of their size, power, and cost advantages, while six-axis configurations remain the standard foundation for closed-loop control and motion sensing. Nine-axis-and-above products are used where magnetic heading assistance, redundancy, or broader state information is required. By gyroscope bias instability, higher-drift products primarily address

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consumer and basic service robots, the 1–10°/h range fits many industrial and mobile-robot platforms, and below-1°/h products are more common in high-end mobile systems, mapping, unmanned systems, and precision control. By form factor, IC/SiP products suit high-volume deep integration, OEM modules balance calibration with development speed, and enclosed IMUs command higher prices through environmental protection and rapid deployment.

Downstream Market Opportunities

Manufacturing and logistics remain the most stable volume opportunities, supported by AMRs, AGVs, robot arms, and mobile manipulators. Medical robotics offers lower unit volumes but stronger requirements for precision, reliability, and traceable calibration, supporting higher-value industrial modules. Consumer and commercial service robots are more price sensitive, yet cleaning, inspection, delivery, and companion platforms can generate substantial sensor volumes. Humanoid robotics is the most important emerging opportunity because balance control, limb-state estimation, and vision stabilization can require multiple synchronized IMUs, raising inertial content per robot. Aerospace and defense robots and unmanned systems are smaller in volume but support tactical MEMS and FOG products with much higher performance requirements.

Regional Insights

Asia is the largest robotics IMU shipment region because industrial robot deployment, mobile-robot manufacturing, and electronics supply chains are concentrated in China, Japan, and South Korea. China benefits from a rapidly expanding robot OEM and component ecosystem that is accelerating qualification of locally calibrated industrial MEMS IMUs, while Japan retains deep capabilities in precision sensing, MEMS processing, and industrial robotics. North American demand is more weighted toward high-value autonomous systems, warehouse automation, unmanned platforms, and defense, with greater emphasis on dynamic performance, stability, and software integration. Europe remains strong in industrial automation, mobile robotics, mapping, and high-performance inertial technology and hosts several specialist IMU and fiber-optic gyro suppliers.

Competitive Landscape Analysis

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Competition is layered by product architecture and performance. Semiconductor sensor suppliers compete through chip-level MEMS scale, unit cost, power, and integration, serving high-volume robotic platforms. Specialist inertial-module suppliers differentiate through full-temperature calibration, low bias drift, low noise, interfaces, firmware, and validation for industrial and premium autonomous systems. Tactical-grade MEMS and fiber-optic suppliers focus on GNSS-denied operation, long-duration stability, and mission reliability. Robot OEMs typically evaluate bias instability, angle random walk, vibration rectification error, output rate, latency, dynamic range, power, size, and interfaces together rather than relying on a single specification. Switching suppliers after design-in can require mechanical changes, thermal recalibration, timing validation, and state-estimation retuning, creating meaningful supplier stickiness and making delivery continuity, application support, and product-lifecycle management important competitive factors.

Report Scope

This report studies the global Inertial Measurement Units for Robotics production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Inertial Measurement Units for Robotics 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 Inertial Measurement Units for Robotics that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Inertial Measurement Units for Robotics total production and demand, 2021-2032, (K Units)

Global Inertial Measurement Units for Robotics total production value, 2021-2032, (USD Million)

Global Inertial Measurement Units for Robotics production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

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Global Inertial Measurement Units for Robotics consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Inertial Measurement Units for Robotics domestic production, consumption, key domestic manufacturers and share

Global Inertial Measurement Units for Robotics production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Inertial Measurement Units for Robotics production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Inertial Measurement Units for Robotics production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Inertial Measurement Units for Robotics 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 Analog Devices, TDK, STMicroelectronics, Bosch Sensortec, Murata Manufacturing, Seiko Epson, Honeywell, VectorNav, Xsens, SBG Systems, 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 Inertial Measurement Units for Robotics market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Units) and average price (US$/Unit) by manufacturer, by 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.

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Global Inertial Measurement Units for Robotics Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Inertial Measurement Units for Robotics Market, Segmentation by Type:

MEMS IMUs

Fiber-Optic Gyro IMUs

Ring Laser Gyro IMUs

Other IMUs

Global Inertial Measurement Units for Robotics Market, Segmentation by Sensor Configuration:

6-Axis IMUs

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9-Axis and Above IMUs

Other Configurations

Global Inertial Measurement Units for Robotics Market, Segmentation by Gyroscope Bias Instability:

Below 1°/h

1–10°/h

Above 10°/h

Global Inertial Measurement Units for Robotics Market, Segmentation by Application:

Manufacturing

Logistics and Warehousing

Healthcare

Consumer and Commercial Services

Aerospace and Defense

Others

Companies Profiled:

Analog Devices

TDK

STMicroelectronics

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Bosch Sensortec

Murata Manufacturing

Seiko Epson

Honeywell

VectorNav

Xsens

SBG Systems

Advanced Navigation

Silicon Sensing

Safran

Exail

Gladiator Technologies

WitMotion

Key Questions Answered

1. How big is the global Inertial Measurement Units for Robotics market?
2. What is the demand of the global Inertial Measurement Units for Robotics market?
3. What is the year over year growth of the global Inertial Measurement Units for Robotics market?
4. What is the total value of the global Inertial Measurement Units for Robotics market?
5. Who are the Major Players in the global Inertial Measurement Units for Robotics market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Inertial Measurement Units for Robotics Introduction
1.2 World Inertial Measurement Units for Robotics Supply & Forecast
  1.2.1 World Inertial Measurement Units for Robotics Production Value (2021 & 2025 & 2032)
  1.2.2 World Inertial Measurement Units for Robotics Production (2021-2032)
  1.2.3 World Inertial Measurement Units for Robotics Pricing Trends (2021-2032)
1.3 World Inertial Measurement Units for Robotics Production by Region (Based on Production Site)
  1.3.1 World Inertial Measurement Units for Robotics Production Value by Region (2021-2032)
  1.3.2 World Inertial Measurement Units for Robotics Production by Region (2021-2032)
  1.3.3 World Inertial Measurement Units for Robotics Average Price by Region (2021-2032)
  1.3.4 North America Inertial Measurement Units for Robotics Production (2021-2032)
  1.3.5 Europe Inertial Measurement Units for Robotics Production (2021-2032)
  1.3.6 China Inertial Measurement Units for Robotics Production (2021-2032)
  1.3.7 Japan Inertial Measurement Units for Robotics Production (2021-2032)
  1.3.8 South Korea Inertial Measurement Units for Robotics Production (2021-2032)
  1.3.9 Southeast Asia Inertial Measurement Units for Robotics Production (2021-2032)
  1.3.10 China Taiwan Inertial Measurement Units for Robotics Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Inertial Measurement Units for Robotics Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Inertial Measurement Units for Robotics Major Market Trends

2 DEMAND SUMMARY

2.1 World Inertial Measurement Units for Robotics Demand (2021-2032)
2.2 World Inertial Measurement Units for Robotics Consumption by Region
  2.2.1 World Inertial Measurement Units for Robotics Consumption by Region (2021-2026)
  2.2.2 World Inertial Measurement Units for Robotics Consumption Forecast by Region (2027-2032)
2.3 United States Inertial Measurement Units for Robotics Consumption (2021-2032)

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2.4 China Inertial Measurement Units for Robotics Consumption (2021-2032)
2.5 Europe Inertial Measurement Units for Robotics Consumption (2021-2032)
2.6 Japan Inertial Measurement Units for Robotics Consumption (2021-2032)
2.7 South Korea Inertial Measurement Units for Robotics Consumption (2021-2032)
2.8 ASEAN Inertial Measurement Units for Robotics Consumption (2021-2032)
2.9 India Inertial Measurement Units for Robotics Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Inertial Measurement Units for Robotics Production Value by Manufacturer (2021-2026)
3.2 World Inertial Measurement Units for Robotics Production by Manufacturer (2021-2026)
3.3 World Inertial Measurement Units for Robotics Average Price by Manufacturer (2021-2026)
3.4 Inertial Measurement Units for Robotics Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Inertial Measurement Units for Robotics Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Inertial Measurement Units for Robotics in 2025
  3.5.3 Global Concentration Ratios (CR8) for Inertial Measurement Units for Robotics in 2025
3.6 Inertial Measurement Units for Robotics Market: Overall Company Footprint Analysis
  3.6.1 Inertial Measurement Units for Robotics Market: Region Footprint
  3.6.2 Inertial Measurement Units for Robotics Market: Company Product Type Footprint
  3.6.3 Inertial Measurement Units for Robotics 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

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info@marketpublishers.com

4.1 United States VS China: Inertial Measurement Units for Robotics Production Value Comparison
4.1.1 United States VS China: Inertial Measurement Units for Robotics Production Value Comparison (2021 & 2025 & 2032)
4.1.2 United States VS China: Inertial Measurement Units for Robotics Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Inertial Measurement Units for Robotics Production Comparison
4.2.1 United States VS China: Inertial Measurement Units for Robotics Production Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: Inertial Measurement Units for Robotics Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Inertial Measurement Units for Robotics Consumption Comparison
4.3.1 United States VS China: Inertial Measurement Units for Robotics Consumption Comparison (2021 & 2025 & 2032)
4.3.2 United States VS China: Inertial Measurement Units for Robotics Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Inertial Measurement Units for Robotics Manufacturers and Market Share, 2021-2026
4.4.1 United States Based Inertial Measurement Units for Robotics Manufacturers, Headquarters and Production Site (States, Country)
4.4.2 United States Based Manufacturers Inertial Measurement Units for Robotics Production Value (2021-2026)
4.4.3 United States Based Manufacturers Inertial Measurement Units for Robotics Production (2021-2026)
4.5 China Based Inertial Measurement Units for Robotics Manufacturers and Market Share
4.5.1 China Based Inertial Measurement Units for Robotics Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Inertial Measurement Units for Robotics Production Value (2021-2026)
4.5.3 China Based Manufacturers Inertial Measurement Units for Robotics Production (2021-2026)
4.6 Rest of World Based Inertial Measurement Units for Robotics Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Inertial Measurement Units for Robotics Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Inertial Measurement Units for Robotics

+357 96 030922
info@marketpublishers.com

Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Inertial Measurement Units for Robotics Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Inertial Measurement Units for Robotics Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 MEMS IMUs
5.2.2 Fiber-Optic Gyro IMUs
5.2.3 Ring Laser Gyro IMUs
5.2.4 Other IMUs
5.3 Market Segment by Type
5.3.1 World Inertial Measurement Units for Robotics Production by Type (2021-2032)
5.3.2 World Inertial Measurement Units for Robotics Production Value by Type (2021-2032)
5.3.3 World Inertial Measurement Units for Robotics Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY SENSOR CONFIGURATION

6.1 World Inertial Measurement Units for Robotics Market Size Overview by Sensor Configuration: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Sensor Configuration
6.2.1 6-Axis IMUs
6.2.2 9-Axis and Above IMUs
6.2.3 Other Configurations
6.3 Market Segment by Sensor Configuration
6.3.1 World Inertial Measurement Units for Robotics Production by Sensor Configuration (2021-2032)
6.3.2 World Inertial Measurement Units for Robotics Production Value by Sensor Configuration (2021-2032)
6.3.3 World Inertial Measurement Units for Robotics Average Price by Sensor Configuration (2021-2032)

7 MARKET ANALYSIS BY GYROSCOPE BIAS INSTABILITY

7.1 World Inertial Measurement Units for Robotics Market Size Overview by Gyroscope

+357 96 030922
info@marketpublishers.com

Bias Instability: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Gyroscope Bias Instability
  7.2.1 Below 1°/h
  7.2.2 1–10°/h
  7.2.3 Above 10°/h
7.3 Market Segment by Gyroscope Bias Instability
  7.3.1 World Inertial Measurement Units for Robotics Production by Gyroscope Bias Instability (2021-2032)
  7.3.2 World Inertial Measurement Units for Robotics Production Value by Gyroscope Bias Instability (2021-2032)
  7.3.3 World Inertial Measurement Units for Robotics Average Price by Gyroscope Bias Instability (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Inertial Measurement Units for Robotics Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
  8.2.1 Manufacturing
  8.2.2 Logistics and Warehousing
  8.2.3 Healthcare
  8.2.4 Consumer and Commercial Services
  8.2.5 Aerospace and Defense
  8.2.6 Others
8.3 Market Segment by Application
  8.3.1 World Inertial Measurement Units for Robotics Production by Application (2021-2032)
  8.3.2 World Inertial Measurement Units for Robotics Production Value by Application (2021-2032)
  8.3.3 World Inertial Measurement Units for Robotics Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Analog Devices
  9.1.1 Analog Devices Details
  9.1.2 Analog Devices Major Business
  9.1.3 Analog Devices Inertial Measurement Units for Robotics Product and Services
  9.1.4 Analog Devices Inertial Measurement Units for Robotics Production, Price,

+357 96 030922
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Value, Gross Margin and Market Share (2021-2026)
9.1.5 Analog Devices Recent Developments/Updates
9.1.6 Analog Devices Competitive Strengths & Weaknesses
9.2 TDK
9.2.1 TDK Details
9.2.2 TDK Major Business
9.2.3 TDK Inertial Measurement Units for Robotics Product and Services
9.2.4 TDK Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 TDK Recent Developments/Updates
9.2.6 TDK Competitive Strengths & Weaknesses
9.3 STMicroelectronics
9.3.1 STMicroelectronics Details
9.3.2 STMicroelectronics Major Business
9.3.3 STMicroelectronics Inertial Measurement Units for Robotics Product and Services
9.3.4 STMicroelectronics Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 STMicroelectronics Recent Developments/Updates
9.3.6 STMicroelectronics Competitive Strengths & Weaknesses
9.4 Bosch Sensortec
9.4.1 Bosch Sensortec Details
9.4.2 Bosch Sensortec Major Business
9.4.3 Bosch Sensortec Inertial Measurement Units for Robotics Product and Services
9.4.4 Bosch Sensortec Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Bosch Sensortec Recent Developments/Updates
9.4.6 Bosch Sensortec Competitive Strengths & Weaknesses
9.5 Murata Manufacturing
9.5.1 Murata Manufacturing Details
9.5.2 Murata Manufacturing Major Business
9.5.3 Murata Manufacturing Inertial Measurement Units for Robotics Product and Services
9.5.4 Murata Manufacturing Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Murata Manufacturing Recent Developments/Updates
9.5.6 Murata Manufacturing Competitive Strengths & Weaknesses
9.6 Seiko Epson
9.6.1 Seiko Epson Details

+357 96 030922
info@marketpublishers.com

9.6.2 Seiko Epson Major Business
9.6.3 Seiko Epson Inertial Measurement Units for Robotics Product and Services
9.6.4 Seiko Epson Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Seiko Epson Recent Developments/Updates
9.6.6 Seiko Epson Competitive Strengths & Weaknesses
9.7 Honeywell
9.7.1 Honeywell Details
9.7.2 Honeywell Major Business
9.7.3 Honeywell Inertial Measurement Units for Robotics Product and Services
9.7.4 Honeywell Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Honeywell Recent Developments/Updates
9.7.6 Honeywell Competitive Strengths & Weaknesses
9.8 VectorNav
9.8.1 VectorNav Details
9.8.2 VectorNav Major Business
9.8.3 VectorNav Inertial Measurement Units for Robotics Product and Services
9.8.4 VectorNav Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 VectorNav Recent Developments/Updates
9.8.6 VectorNav Competitive Strengths & Weaknesses
9.9 Xsens
9.9.1 Xsens Details
9.9.2 Xsens Major Business
9.9.3 Xsens Inertial Measurement Units for Robotics Product and Services
9.9.4 Xsens Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Xsens Recent Developments/Updates
9.9.6 Xsens Competitive Strengths & Weaknesses
9.10 SBG Systems
9.10.1 SBG Systems Details
9.10.2 SBG Systems Major Business
9.10.3 SBG Systems Inertial Measurement Units for Robotics Product and Services
9.10.4 SBG Systems Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.10.5 SBG Systems Recent Developments/Updates
9.10.6 SBG Systems Competitive Strengths & Weaknesses
9.11 Advanced Navigation

+357 96 030922
info@marketpublishers.com

9.11.1 Advanced Navigation Details
9.11.2 Advanced Navigation Major Business
9.11.3 Advanced Navigation Inertial Measurement Units for Robotics Product and Services
9.11.4 Advanced Navigation Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 Advanced Navigation Recent Developments/Updates
9.11.6 Advanced Navigation Competitive Strengths & Weaknesses
9.12 Silicon Sensing
9.12.1 Silicon Sensing Details
9.12.2 Silicon Sensing Major Business
9.12.3 Silicon Sensing Inertial Measurement Units for Robotics Product and Services
9.12.4 Silicon Sensing Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 Silicon Sensing Recent Developments/Updates
9.12.6 Silicon Sensing Competitive Strengths & Weaknesses
9.13 Safran
9.13.1 Safran Details
9.13.2 Safran Major Business
9.13.3 Safran Inertial Measurement Units for Robotics Product and Services
9.13.4 Safran Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 Safran Recent Developments/Updates
9.13.6 Safran Competitive Strengths & Weaknesses
9.14 Exail
9.14.1 Exail Details
9.14.2 Exail Major Business
9.14.3 Exail Inertial Measurement Units for Robotics Product and Services
9.14.4 Exail Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.14.5 Exail Recent Developments/Updates
9.14.6 Exail Competitive Strengths & Weaknesses
9.15 Gladiator Technologies
9.15.1 Gladiator Technologies Details
9.15.2 Gladiator Technologies Major Business
9.15.3 Gladiator Technologies Inertial Measurement Units for Robotics Product and Services
9.15.4 Gladiator Technologies Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

9.15.5 Gladiator Technologies Recent Developments/Updates
9.15.6 Gladiator Technologies Competitive Strengths & Weaknesses
9.16 WitMotion
9.16.1 WitMotion Details
9.16.2 WitMotion Major Business
9.16.3 WitMotion Inertial Measurement Units for Robotics Product and Services
9.16.4 WitMotion Inertial Measurement Units for Robotics Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.16.5 WitMotion Recent Developments/Updates
9.16.6 WitMotion Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Inertial Measurement Units for Robotics Industry Chain
10.2 Inertial Measurement Units for Robotics Upstream Analysis
10.2.1 Inertial Measurement Units for Robotics Core Raw Materials
10.2.2 Main Manufacturers of Inertial Measurement Units for Robotics Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Inertial Measurement Units for Robotics Production Mode
10.6 Inertial Measurement Units for Robotics Procurement Model
10.7 Inertial Measurement Units for Robotics Industry Sales Model and Sales Channels
10.7.1 Inertial Measurement Units for Robotics Sales Model
10.7.2 Inertial Measurement Units for Robotics Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World Inertial Measurement Units for Robotics Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Inertial Measurement Units for Robotics Production Value by Region (2021-2026) & (USD Million)
Table 3. World Inertial Measurement Units for Robotics Production Value by Region (2027-2032) & (USD Million)
Table 4. World Inertial Measurement Units for Robotics Production Value Market Share by Region (2021-2026)
Table 5. World Inertial Measurement Units for Robotics Production Value Market Share by Region (2027-2032)
Table 6. World Inertial Measurement Units for Robotics Production by Region (2021-2026) & (K Units)
Table 7. World Inertial Measurement Units for Robotics Production by Region (2027-2032) & (K Units)
Table 8. World Inertial Measurement Units for Robotics Production Market Share by Region (2021-2026)
Table 9. World Inertial Measurement Units for Robotics Production Market Share by Region (2027-2032)
Table 10. World Inertial Measurement Units for Robotics Average Price by Region (2021-2026) & (US$/Unit)
Table 11. World Inertial Measurement Units for Robotics Average Price by Region (2027-2032) & (US$/Unit)
Table 12. Inertial Measurement Units for Robotics Major Market Trends
Table 13. World Inertial Measurement Units for Robotics Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)
Table 14. World Inertial Measurement Units for Robotics Consumption by Region (2021-2026) & (K Units)
Table 15. World Inertial Measurement Units for Robotics Consumption Forecast by Region (2027-2032) & (K Units)
Table 16. World Inertial Measurement Units for Robotics Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Inertial Measurement Units for Robotics Producers in 2025
Table 18. World Inertial Measurement Units for Robotics Production by Manufacturer (2021-2026) & (K Units)

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Table 19. Production Market Share of Key Inertial Measurement Units for Robotics Producers in 2025
Table 20. World Inertial Measurement Units for Robotics Average Price by Manufacturer (2021-2026) & (US$/Unit)
Table 21. Global Inertial Measurement Units for Robotics Company Evaluation Quadrant
Table 22. World Inertial Measurement Units for Robotics Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Inertial Measurement Units for Robotics Production Site of Key Manufacturer
Table 24. Inertial Measurement Units for Robotics Market: Company Product Type Footprint
Table 25. Inertial Measurement Units for Robotics Market: Company Product Application Footprint
Table 26. Inertial Measurement Units for Robotics Competitive Factors
Table 27. Inertial Measurement Units for Robotics New Entrant and Capacity Expansion Plans
Table 28. Inertial Measurement Units for Robotics Mergers & Acquisitions Activity
Table 29. United States VS China Inertial Measurement Units for Robotics Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Inertial Measurement Units for Robotics Production Comparison, (2021 & 2025 & 2032) & (K Units)
Table 31. United States VS China Inertial Measurement Units for Robotics Consumption Comparison, (2021 & 2025 & 2032) & (K Units)
Table 32. United States Based Inertial Measurement Units for Robotics Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Inertial Measurement Units for Robotics Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Inertial Measurement Units for Robotics Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Inertial Measurement Units for Robotics Production (2021-2026) & (K Units)
Table 36. United States Based Manufacturers Inertial Measurement Units for Robotics Production Market Share (2021-2026)
Table 37. China Based Inertial Measurement Units for Robotics Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Inertial Measurement Units for Robotics Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Inertial Measurement Units for Robotics

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Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Inertial Measurement Units for Robotics Production, (2021-2026) & (K Units)
Table 41. China Based Manufacturers Inertial Measurement Units for Robotics Production Market Share (2021-2026)
Table 42. Rest of World Based Inertial Measurement Units for Robotics Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Inertial Measurement Units for Robotics Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Inertial Measurement Units for Robotics Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Inertial Measurement Units for Robotics Production, (2021-2026) & (K Units)
Table 46. Rest of World Based Manufacturers Inertial Measurement Units for Robotics Production Market Share (2021-2026)
Table 47. World Inertial Measurement Units for Robotics Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Inertial Measurement Units for Robotics Production by Type (2021-2026) & (K Units)
Table 49. World Inertial Measurement Units for Robotics Production by Type (2027-2032) & (K Units)
Table 50. World Inertial Measurement Units for Robotics Production Value by Type (2021-2026) & (USD Million)
Table 51. World Inertial Measurement Units for Robotics Production Value by Type (2027-2032) & (USD Million)
Table 52. World Inertial Measurement Units for Robotics Average Price by Type (2021-2026) & (US$/Unit)
Table 53. World Inertial Measurement Units for Robotics Average Price by Type (2027-2032) & (US$/Unit)
Table 54. World Inertial Measurement Units for Robotics Production Value by Sensor Configuration, (USD Million), 2021 & 2025 & 2032
Table 55. World Inertial Measurement Units for Robotics Production by Sensor Configuration (2021-2026) & (K Units)
Table 56. World Inertial Measurement Units for Robotics Production by Sensor Configuration (2027-2032) & (K Units)
Table 57. World Inertial Measurement Units for Robotics Production Value by Sensor Configuration (2021-2026) & (USD Million)
Table 58. World Inertial Measurement Units for Robotics Production Value by Sensor Configuration (2027-2032) & (USD Million)

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Table 59. World Inertial Measurement Units for Robotics Average Price by Sensor Configuration (2021-2026) & (US$/Unit)
Table 60. World Inertial Measurement Units for Robotics Average Price by Sensor Configuration (2027-2032) & (US$/Unit)
Table 61. World Inertial Measurement Units for Robotics Production Value by Gyroscope Bias Instability, (USD Million), 2021 & 2025 & 2032
Table 62. World Inertial Measurement Units for Robotics Production by Gyroscope Bias Instability (2021-2026) & (K Units)
Table 63. World Inertial Measurement Units for Robotics Production by Gyroscope Bias Instability (2027-2032) & (K Units)
Table 64. World Inertial Measurement Units for Robotics Production Value by Gyroscope Bias Instability (2021-2026) & (USD Million)
Table 65. World Inertial Measurement Units for Robotics Production Value by Gyroscope Bias Instability (2027-2032) & (USD Million)
Table 66. World Inertial Measurement Units for Robotics Average Price by Gyroscope Bias Instability (2021-2026) & (US$/Unit)
Table 67. World Inertial Measurement Units for Robotics Average Price by Gyroscope Bias Instability (2027-2032) & (US$/Unit)
Table 68. World Inertial Measurement Units for Robotics Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Inertial Measurement Units for Robotics Production by Application (2021-2026) & (K Units)
Table 70. World Inertial Measurement Units for Robotics Production by Application (2027-2032) & (K Units)
Table 71. World Inertial Measurement Units for Robotics Production Value by Application (2021-2026) & (USD Million)
Table 72. World Inertial Measurement Units for Robotics Production Value by Application (2027-2032) & (USD Million)
Table 73. World Inertial Measurement Units for Robotics Average Price by Application (2021-2026) & (US$/Unit)
Table 74. World Inertial Measurement Units for Robotics Average Price by Application (2027-2032) & (US$/Unit)
Table 75. Analog Devices Basic Information, Manufacturing Base and Competitors
Table 76. Analog Devices Major Business
Table 77. Analog Devices Inertial Measurement Units for Robotics Product and Services
Table 78. Analog Devices Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 79. Analog Devices Recent Developments/Updates
Table 80. Analog Devices Competitive Strengths & Weaknesses
Table 81. TDK Basic Information, Manufacturing Base and Competitors
Table 82. TDK Major Business
Table 83. TDK Inertial Measurement Units for Robotics Product and Services
Table 84. TDK Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. TDK Recent Developments/Updates
Table 86. TDK Competitive Strengths & Weaknesses
Table 87. STMicroelectronics Basic Information, Manufacturing Base and Competitors
Table 88. STMicroelectronics Major Business
Table 89. STMicroelectronics Inertial Measurement Units for Robotics Product and Services
Table 90. STMicroelectronics Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. STMicroelectronics Recent Developments/Updates
Table 92. STMicroelectronics Competitive Strengths & Weaknesses
Table 93. Bosch Sensortec Basic Information, Manufacturing Base and Competitors
Table 94. Bosch Sensortec Major Business
Table 95. Bosch Sensortec Inertial Measurement Units for Robotics Product and Services
Table 96. Bosch Sensortec Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Bosch Sensortec Recent Developments/Updates
Table 98. Bosch Sensortec Competitive Strengths & Weaknesses
Table 99. Murata Manufacturing Basic Information, Manufacturing Base and Competitors
Table 100. Murata Manufacturing Major Business
Table 101. Murata Manufacturing Inertial Measurement Units for Robotics Product and Services
Table 102. Murata Manufacturing Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Murata Manufacturing Recent Developments/Updates
Table 104. Murata Manufacturing Competitive Strengths & Weaknesses
Table 105. Seiko Epson Basic Information, Manufacturing Base and Competitors

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Table 106. Seiko Epson Major Business
Table 107. Seiko Epson Inertial Measurement Units for Robotics Product and Services
Table 108. Seiko Epson Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Seiko Epson Recent Developments/Updates
Table 110. Seiko Epson Competitive Strengths & Weaknesses
Table 111. Honeywell Basic Information, Manufacturing Base and Competitors
Table 112. Honeywell Major Business
Table 113. Honeywell Inertial Measurement Units for Robotics Product and Services
Table 114. Honeywell Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Honeywell Recent Developments/Updates
Table 116. Honeywell Competitive Strengths & Weaknesses
Table 117. VectorNav Basic Information, Manufacturing Base and Competitors
Table 118. VectorNav Major Business
Table 119. VectorNav Inertial Measurement Units for Robotics Product and Services
Table 120. VectorNav Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. VectorNav Recent Developments/Updates
Table 122. VectorNav Competitive Strengths & Weaknesses
Table 123. Xsens Basic Information, Manufacturing Base and Competitors
Table 124. Xsens Major Business
Table 125. Xsens Inertial Measurement Units for Robotics Product and Services
Table 126. Xsens Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Xsens Recent Developments/Updates
Table 128. Xsens Competitive Strengths & Weaknesses
Table 129. SBG Systems Basic Information, Manufacturing Base and Competitors
Table 130. SBG Systems Major Business
Table 131. SBG Systems Inertial Measurement Units for Robotics Product and Services
Table 132. SBG Systems Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. SBG Systems Recent Developments/Updates
Table 134. SBG Systems Competitive Strengths & Weaknesses

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Table 135. Advanced Navigation Basic Information, Manufacturing Base and Competitors
Table 136. Advanced Navigation Major Business
Table 137. Advanced Navigation Inertial Measurement Units for Robotics Product and Services
Table 138. Advanced Navigation Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Advanced Navigation Recent Developments/Updates
Table 140. Advanced Navigation Competitive Strengths & Weaknesses
Table 141. Silicon Sensing Basic Information, Manufacturing Base and Competitors
Table 142. Silicon Sensing Major Business
Table 143. Silicon Sensing Inertial Measurement Units for Robotics Product and Services
Table 144. Silicon Sensing Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Silicon Sensing Recent Developments/Updates
Table 146. Silicon Sensing Competitive Strengths & Weaknesses
Table 147. Safran Basic Information, Manufacturing Base and Competitors
Table 148. Safran Major Business
Table 149. Safran Inertial Measurement Units for Robotics Product and Services
Table 150. Safran Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. Safran Recent Developments/Updates
Table 152. Safran Competitive Strengths & Weaknesses
Table 153. Exail Basic Information, Manufacturing Base and Competitors
Table 154. Exail Major Business
Table 155. Exail Inertial Measurement Units for Robotics Product and Services
Table 156. Exail Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. Exail Recent Developments/Updates
Table 158. Exail Competitive Strengths & Weaknesses
Table 159. Gladiator Technologies Basic Information, Manufacturing Base and Competitors
Table 160. Gladiator Technologies Major Business
Table 161. Gladiator Technologies Inertial Measurement Units for Robotics Product and

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Services
Table 162. Gladiator Technologies Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Gladiator Technologies Recent Developments/Updates
Table 164. Gladiator Technologies Competitive Strengths & Weaknesses
Table 165. WitMotion Basic Information, Manufacturing Base and Competitors
Table 166. WitMotion Major Business
Table 167. WitMotion Inertial Measurement Units for Robotics Product and Services
Table 168. WitMotion Inertial Measurement Units for Robotics Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. WitMotion Recent Developments/Updates
Table 170. WitMotion Competitive Strengths & Weaknesses
Table 171. Global Key Players of Inertial Measurement Units for Robotics Upstream (Raw Materials)
Table 172. Global Inertial Measurement Units for Robotics Typical Customers
Table 173. Inertial Measurement Units for Robotics Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Inertial Measurement Units for Robotics Picture
Figure 2. World Inertial Measurement Units for Robotics Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Inertial Measurement Units for Robotics Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Inertial Measurement Units for Robotics Production (2021-2032) & (K Units)
Figure 5. World Inertial Measurement Units for Robotics Average Price (2021-2032) & (US$/Unit)
Figure 6. World Inertial Measurement Units for Robotics Production Value Market Share by Region (2021-2032)
Figure 7. World Inertial Measurement Units for Robotics Production Market Share by Region (2021-2032)
Figure 8. North America Inertial Measurement Units for Robotics Production (2021-2032) & (K Units)
Figure 9. Europe Inertial Measurement Units for Robotics Production (2021-2032) & (K Units)
Figure 10. China Inertial Measurement Units for Robotics Production (2021-2032) & (K Units)
Figure 11. Japan Inertial Measurement Units for Robotics Production (2021-2032) & (K Units)
Figure 12. South Korea Inertial Measurement Units for Robotics Production (2021-2032) & (K Units)
Figure 13. Southeast Asia Inertial Measurement Units for Robotics Production (2021-2032) & (K Units)
Figure 14. China Taiwan Inertial Measurement Units for Robotics Production (2021-2032) & (K Units)
Figure 15. Inertial Measurement Units for Robotics Market Drivers
Figure 16. Factors Affecting Demand
Figure 17. World Inertial Measurement Units for Robotics Consumption (2021-2032) & (K Units)
Figure 18. World Inertial Measurement Units for Robotics Consumption Market Share by Region (2021-2032)
Figure 19. United States Inertial Measurement Units for Robotics Consumption (2021-2032) & (K Units)

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Figure 20. China Inertial Measurement Units for Robotics Consumption (2021-2032) & (K Units)
Figure 21. Europe Inertial Measurement Units for Robotics Consumption (2021-2032) & (K Units)
Figure 22. Japan Inertial Measurement Units for Robotics Consumption (2021-2032) & (K Units)
Figure 23. South Korea Inertial Measurement Units for Robotics Consumption (2021-2032) & (K Units)
Figure 24. ASEAN Inertial Measurement Units for Robotics Consumption (2021-2032) & (K Units)
Figure 25. India Inertial Measurement Units for Robotics Consumption (2021-2032) & (K Units)
Figure 26. Producer Shipments of Inertial Measurement Units for Robotics by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 27. Global Four-firm Concentration Ratios (CR4) for Inertial Measurement Units for Robotics Markets in 2025
Figure 28. Global Four-firm Concentration Ratios (CR8) for Inertial Measurement Units for Robotics Markets in 2025
Figure 29. United States VS China: Inertial Measurement Units for Robotics Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 30. United States VS China: Inertial Measurement Units for Robotics Production Market Share Comparison (2021 & 2025 & 2032)
Figure 31. United States VS China: Inertial Measurement Units for Robotics Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 32. United States Based Manufacturers Inertial Measurement Units for Robotics Production Market Share 2025
Figure 33. China Based Manufacturers Inertial Measurement Units for Robotics Production Market Share 2025
Figure 34. Rest of World Based Manufacturers Inertial Measurement Units for Robotics Production Market Share 2025
Figure 35. World Inertial Measurement Units for Robotics Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 36. World Inertial Measurement Units for Robotics Production Value Market Share by Type in 2025
Figure 37. MEMS IMUs
Figure 38. Fiber-Optic Gyro IMUs
Figure 39. Ring Laser Gyro IMUs
Figure 40. Other IMUs
Figure 41. World Inertial Measurement Units for Robotics Production Market Share by

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Type (2021-2032)
Figure 42. World Inertial Measurement Units for Robotics Production Value Market Share by Type (2021-2032)
Figure 43. World Inertial Measurement Units for Robotics Average Price by Type (2021-2032) & (US$/Unit)
Figure 44. World Inertial Measurement Units for Robotics Production Value by Sensor Configuration, (USD Million), 2021 & 2025 & 2032
Figure 45. World Inertial Measurement Units for Robotics Production Value Market Share by Sensor Configuration in 2025
Figure 46. 6-Axis IMUs
Figure 47. 9-Axis and Above IMUs
Figure 48. Other Configurations
Figure 49. World Inertial Measurement Units for Robotics Production Market Share by Sensor Configuration (2021-2032)
Figure 50. World Inertial Measurement Units for Robotics Production Value Market Share by Sensor Configuration (2021-2032)
Figure 51. World Inertial Measurement Units for Robotics Average Price by Sensor Configuration (2021-2032) & (US$/Unit)
Figure 52. World Inertial Measurement Units for Robotics Production Value by Gyroscope Bias Instability, (USD Million), 2021 & 2025 & 2032
Figure 53. World Inertial Measurement Units for Robotics Production Value Market Share by Gyroscope Bias Instability in 2025
Figure 54. Below 1°/h
Figure 55. 1–10°/h
Figure 56. Above 10°/h
Figure 57. World Inertial Measurement Units for Robotics Production Market Share by Gyroscope Bias Instability (2021-2032)
Figure 58. World Inertial Measurement Units for Robotics Production Value Market Share by Gyroscope Bias Instability (2021-2032)
Figure 59. World Inertial Measurement Units for Robotics Average Price by Gyroscope Bias Instability (2021-2032) & (US$/Unit)
Figure 60. World Inertial Measurement Units for Robotics Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 61. World Inertial Measurement Units for Robotics Production Value Market Share by Application in 2025
Figure 62. Manufacturing
Figure 63. Logistics and Warehousing
Figure 64. Healthcare
Figure 65. Consumer and Commercial Services

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Figure 66. Aerospace and Defense
Figure 67. Others
Figure 68. World Inertial Measurement Units for Robotics Production Market Share by Application (2021-2032)
Figure 69. World Inertial Measurement Units for Robotics Production Value Market Share by Application (2021-2032)
Figure 70. World Inertial Measurement Units for Robotics Average Price by Application (2021-2032) & (US$/Unit)
Figure 71. Inertial Measurement Units for Robotics Industry Chain
Figure 72. Inertial Measurement Units for Robotics Procurement Model
Figure 73. Inertial Measurement Units for Robotics Sales Model
Figure 74. Inertial Measurement Units for Robotics Sales Channels, Direct Sales, and Distribution
Figure 75. Methodology
Figure 76. Research Process and Data Source

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