

Global Robotic Automated Fiber Placement (AFP) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Robotic Automated Fiber Placement (AFP) market size is expected to reach \$ 655 million by 2032, rising at a market growth of 7.4% CAGR during the forecast period (2026-2032).

In 2025, global Robotic Automated Fiber Placement (AFP) production reached approximately 170 units, with an average global market price of around 2.25 M US\$/unit.

Robotic Automated Fiber Placement (AFP) is an advanced composite material manufacturing technology that integrates industrial robotics with precision fiber placement processes, designed to efficiently and accurately lay continuous fiber-reinforced materials (such as carbon fiber tows pre-impregnated with epoxy resin) onto molds or mandrels to form high-performance composite structures. Composed of a robotic arm, a specialized placement head, fiber tow feeding systems, heating and compaction modules, and intelligent control software, the system enables automated, programmable placement of fiber tows in specific orientations (typically 0°, +45°, -45°, and 90°) to build up plies with balanced mechanical properties in all directions. Each fiber tow can be independently controlled, cut, and restarted, allowing the system to adapt to complex curved surfaces and variable part geometries, minimize material waste, and ensure consistent layup precision that surpasses manual methods or traditional automated tape laying (ATL) technology. It is characterized by high efficiency, high precision, and strong adaptability, serving as a core technology for manufacturing lightweight, high-strength composite components in high-performance industries.

The demand for Robotic Automated Fiber Placement (AFP) is driven by the growing adoption of composite materials across aerospace, automotive, wind energy, and

marine industries, as well as the global emphasis on lightweighting, energy efficiency, and sustainable manufacturing. From the demand side, the expansion of commercial and military aerospace programs (such as aircraft wing and fuselage manufacturing) requires high-precision AFP systems to produce complex composite structures; the shift toward electric vehicles (EVs) and fuel-efficient vehicles drives demand for AFP to manufacture lightweight components that reduce energy consumption; the growth of the wind energy sector also boosts demand for AFP to produce longer, more aerodynamic turbine blades. Additionally, the need to replace manual layup processes to improve production consistency, reduce labor costs, and meet strict industry certification standards further fuels market demand. In terms of business opportunities, developing high-efficiency, multi-tow AFP systems with advanced heating and compaction technologies can cater to the demand for large-scale, high-throughput production in aerospace and wind energy sectors. Providing customized solutions for different industries (e.g., compact AFP systems for automotive small-component manufacturing, large-gantry AFP systems for aircraft fuselages) can enhance market competitiveness. Cooperating with composite material suppliers, aircraft manufacturers, and wind turbine producers to integrate AFP into their production lines, as well as offering technical training and after-sales maintenance services, can expand market coverage. Furthermore, integrating AI and digital twin technologies to optimize placement paths, reduce material waste, and enable real-time process monitoring can improve product added value and seize opportunities in the intelligent manufacturing trend.

This report studies the global Robotic Automated Fiber Placement (AFP) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Robotic Automated Fiber Placement (AFP) 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 Robotic Automated Fiber Placement (AFP) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Robotic Automated Fiber Placement (AFP) total production and demand, 2021-2032, (Units)

Global Robotic Automated Fiber Placement (AFP) total production value, 2021-2032, (USD Million)

Global Robotic Automated Fiber Placement (AFP) production by region & country,

production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Robotic Automated Fiber Placement (AFP) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Robotic Automated Fiber Placement (AFP) domestic production, consumption, key domestic manufacturers and share

Global Robotic Automated Fiber Placement (AFP) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Robotic Automated Fiber Placement (AFP) production by Motion Platform, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Robotic Automated Fiber Placement (AFP) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Robotic Automated Fiber Placement (AFP) 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 MTorres, Fives, Electroimpact, Ingersoll Machine Tools, Coriolis Composites, Tsudakoma, Mikrosam, Trelleborg Group, Broetje-Automation, Accudyne, 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 Robotic Automated Fiber Placement (AFP) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Motion Platform, 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 Robotic Automated Fiber Placement (AFP) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Robotic Automated Fiber Placement (AFP) Market, Segmentation by Motion Platform:

Robotic Arm System

Gantry System

Hybrid Multi-Axis System

Others

Global Robotic Automated Fiber Placement (AFP) Market, Segmentation by Tow Configuration:

Single-Tow System

Multi-Tow System

High-Throughput Multi-Tow System

Others

Global Robotic Automated Fiber Placement (AFP) Market, Segmentation by Production

Purpose:

R&D and Prototype

Industrial Production

High-Volume Production

Global Robotic Automated Fiber Placement (AFP) Market, Segmentation by Application:

Aerospace

Defense

Automotive

Wind Energy

Marine

Medical Devices

Research and Advanced Manufacturing

Others

Companies Profiled:

MTorres

Fives

Electroimpact

Ingersoll Machine Tools

Coriolis Composites

Tsudakoma

Mikrosam

Trelleborg Group

Broetje-Automation

Accudyne

Jota Machinery

Coexpair Dynamics

Addcomposites

Avel Robotics

Key Questions Answered:

1. How big is the global Robotic Automated Fiber Placement (AFP) market?
2. What is the demand of the global Robotic Automated Fiber Placement (AFP) market?
3. What is the year over year growth of the global Robotic Automated Fiber Placement (AFP) market?
4. What is the production and production value of the global Robotic Automated Fiber Placement (AFP) market?
5. Who are the key producers in the global Robotic Automated Fiber Placement (AFP) market?
6. What are the growth factors driving the market demand?

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