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Global Safety Laser Scanners for Robots Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/G82D6D01CA7AEN.html
Date: September 2026
Pages: 116
Price: US$ 4,480.00 (Single User License)
ID: G82D6D01CA7AEN

Abstracts

The global Safety Laser Scanners for Robots market size is expected to reach $ 412 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

Safety Laser Scanners for Robots are non-contact, safety-related sensing devices designed for automated guided vehicles, autonomous mobile robots, autonomous forklifts, mobile manipulators, industrial robot cells and collaborative robotic systems. The products use laser scanning, time-of-flight ranging and diffuse-reflection detection to establish configurable protective fields, warning fields and contour-monitoring zones around moving robots or fixed robotic work areas. When a person or obstacle enters a defined protective field, the scanner transmits safety-related slowdown, controlled-stop or emergency-stop signals to robot controllers, safety PLCs or drive systems through OSSD outputs or safety communication networks. The market primarily covers 2D planar safety laser scanners, emerging 3D volumetric functional-safety LiDAR, indoor-rated and outdoor-capable models, and products combining safety protection with navigation-data output. Key specifications include protective field range, scanning angle, response time, detection capability, safety field configuration, environmental rating, communication interface and compliance with functional-safety requirements. IEC 61496-3:2025 defines requirements for diffuse-reflection electro-sensitive protective equipment designed to detect persons as part of safety-related systems.

Key Findings

The global average price was approximately US$2,650 per unit in 2025.2D planar safety laser scanners remained the mainstream product type.3D

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functional safety LiDAR remained at an early stage of commercialization.

Mobile robot onboard safeguarding accounted for approximately 70% of market revenue.

Asia-Pacific remained the leading regional market by demand.

Mainstream indoor 2D products were priced at approximately US$2,500–4,000 per unit.

Outdoor-capable and 3D products were priced at approximately US$5,000–10,000 per unit.

Safety-and-navigation integrated and 3D products are expected to grow faster.

Market Trends

Product development is shifting from conventional standalone area protection toward compact, software-configurable safety sensing platforms that combine personnel protection, dynamic field switching, diagnostic functions and robot-navigation data. Compact form factors are increasingly important for low-profile AMRs, while longer-range models support faster and heavier mobile platforms. Current commercial products span approximately 3.0-meter compact protective ranges to more than 8.0 meters for large-area applications, and selected systems can output measurement data for AGV and AMR navigation in parallel with certified safety functions.

The next stage of technology development is moving toward outdoor operation and 3D volumetric protection. Outdoor products require stable personnel detection under sunlight, rain, snow, fog and temperature variation, creating materially higher technical and certification barriers than standard indoor scanners. Certified 3D functional-safety LiDAR is beginning to address blind zones, load overhangs, irregular objects and height-dependent hazards that cannot be fully covered by a single 2D scanning plane. However, 3D products remain in an early commercialization phase and will complement rather than rapidly replace mainstream 2D scanners.

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Market Dynamics

The market combines a mature functional-safety technology base with a growing robotic application base. Safety certification, deterministic response, redundant architecture and long customer-validation cycles favor established suppliers, while expanding AGV, AMR and autonomous forklift deployment creates room for regional manufacturers and new 3D sensing entrants. Pricing pressure is most visible in standard indoor 2D products, particularly in Asia, but the effect on total revenue is partly offset by increasing demand for safety communication, navigation-data output, longer protective ranges, outdoor suitability and three-dimensional detection. The market therefore exhibits moderate unit-price erosion in mature products alongside structural premiumization in advanced configurations.

Drivers

The primary driver is the continued expansion of mobile robots in manufacturing and intralogistics. The International Federation of Robotics reported 102,900 transportation and logistics service robots sold in 2024, representing 14% year-on-year growth, with indoor transportation remaining the largest professional service-robot application. Industrial robot installations also reached 542,000 units in 2024, remaining above 500,000 units for a fourth consecutive year. These installations support demand for both onboard mobile-robot safeguarding and flexible protection around robotic production cells. Asia accounted for 74% of new industrial robot deployments in 2024, reinforcing the region’s importance for future safety-scanner demand.

A second driver is the transition from fenced, fixed automation toward flexible human-machine workspaces. Dynamic speed control, route changes, mixed pedestrian traffic and frequent material-transfer operations increase the value of configurable protective fields compared with fixed guards or single-function protective devices. Safety scanners can change monitored fields according to vehicle direction, speed, load and operating mode, making them particularly suitable for modern AMRs and autonomous forklifts.

Restraints

Functional-safety certification and application validation remain the most important market restraints. A product must do more than detect an obstacle: it must provide predictable response times, fault detection, safety outputs and documented behavior

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within a safety-related control system. Certification, redundant hardware design, optical reliability testing and lifecycle documentation increase development cost and limit the number of credible suppliers. Customers in automotive, semiconductor, pharmaceutical and other high-reliability industries also require extended field testing before approving a new safety sensor.

Demand is further constrained by the availability of alternative protective technologies. Safety light curtains, safety cameras, pressure-sensitive devices, safety radar and physical guarding may offer lower cost or better suitability in specific environments. Small, low-speed robots operating in restricted areas may use standard navigation LiDAR combined with bumpers or operational controls rather than a certified safety scanner. These alternatives limit the addressable penetration rate even as the overall robot population expands.

Opportunities

Safety-and-navigation integration represents one of the clearest market opportunities. A scanner that provides certified protective functions and high-quality measurement data can reduce sensor count, wiring complexity, installation space and system-integration cost on an AGV or AMR. Products capable of delivering contour data to the navigation computer while independently maintaining safety fields are therefore positioned to gain share in compact and high-volume mobile platforms. Official product portfolios already demonstrate simultaneous safety protection and AGV navigation-data output.

Outdoor logistics, heavy-load mobile robots and autonomous forklifts offer an additional premium opportunity. These applications require longer ranges, resistance to environmental interference, multiple field sets and improved detection of suspended loads or irregular obstacles. Certified 3D safety LiDAR may also create incremental demand in applications where a single horizontal plane cannot reliably protect the complete operating envelope.

Challenges

The most significant technical challenge is maintaining reliable personnel detection without excessive false stops. Reflective surfaces, dark clothing, dust, smoke, sunlight, rain, vehicle vibration and changing floor conditions can affect optical detection. Conservative scanner settings improve safety but may reduce robot speed and productivity, while aggressive settings increase validation risk. Suppliers must therefore

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balance detection reliability, response time, field resolution and environmental robustness.

A second challenge is integration complexity. Scanner selection cannot be separated from robot braking distance, maximum speed, load condition, turning radius, mounting position and safety-controller architecture. Incorrect protective-field calculation or inadequate commissioning can compromise the complete safety function even when the sensor itself is certified. This increases the importance of configuration software, application engineering, functional-safety expertise and local technical support.

Industry Chain Analysis

The upstream industry chain includes laser emitters, photodetectors, optical lenses, scanning motors or solid-state beam-steering components, processors, functional-safety microcontrollers, communication chips, connectors, housings and embedded software. Critical upstream capabilities are concentrated in optical design, high-reliability electronic components and safety-rated processing architectures. Scanner manufacturers integrate these components into complete sensing platforms and are responsible for optical performance, redundant safety logic, diagnostic coverage, firmware, configuration tools and certification.

Downstream channels include direct sales to robot and AGV manufacturers, industrial automation distributors, machine builders, safety-system integrators and end-user factories. Mobile robot OEMs increasingly participate early in product selection because sensor size, field of view, communication protocols and braking logic directly affect vehicle design. End users remain influential in automotive, electronics, logistics and other industries where approved supplier lists and plant-level safety standards determine final adoption.

Value Chain Analysis

The highest value is generated by safety architecture, certified software, optical reliability and application engineering rather than by basic distance measurement alone. Laser emitters, receivers and standard processors are important cost components, but they are increasingly available from multiple suppliers. Differentiation is concentrated in redundant system design, environmental filtering, safe field evaluation, diagnostic algorithms, safety-network connectivity and certification documentation.

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Manufacturers with established functional-safety expertise can command premium pricing because customers are purchasing a validated safety function, not merely a LiDAR sensor. Additional value is created through configuration software, field-design tools, commissioning support, replacement availability and long product lifecycles. Navigation-data output, outdoor suitability and 3D protection further increase product value, while conventional indoor safety-only models face stronger price competition and localization pressure.

Segment Insights

By scanning dimension, 2D planar safety laser scanners remain the largest product segment because they offer mature certification, established installation practices and sufficient performance for most AGV, AMR and robot-cell applications. 3D volumetric safety LiDAR remains a low-single-digit revenue segment but occupies a substantially higher price band and is expected to expand as customers seek protection above and below a fixed horizontal plane.

By protective range, products rated above 3.0 meters and up to 6.0 meters represent the principal commercial range for mainstream mobile robots. Products at or below 3.0 meters serve compact and low-speed platforms, while models above 6.0 meters are used for high-speed vehicles, heavy loads and large robot areas. By application, mobile robot onboard safeguarding is the largest and fastest-expanding category, followed by fixed robot-cell area guarding and robot-transfer or interaction-zone protection.

Downstream Market Opportunities

Logistics and warehousing provide the broadest volume opportunity because distribution centers, manufacturing warehouses and third-party logistics operators continue to automate material movement. Autonomous forklifts and heavy-load AMRs are particularly attractive because they typically require larger protective fields, multiple scanners or higher-value configurations than lightweight robots.

Automotive and transportation-equipment manufacturing remain important premium markets due to large installed robot bases, strict plant-safety requirements and extensive use of AGVs. Electronics and semiconductor facilities provide opportunities for compact scanners, clean manufacturing environments and high-density internal logistics. Food, beverage and pharmaceutical applications offer smaller volumes but

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require reliable operation in controlled, hygienic or washdown-adjacent environments, supporting demand for specialized product configurations.

Regional Insights

Asia-Pacific is the largest demand region, representing an estimated 40%–44% of global revenue. The region benefits from the world's largest industrial robot deployment base, rapidly expanding mobile-robot production and growing localization of safety sensors. China is the principal source of incremental unit demand and emerging domestic supply, while Japan maintains strong capabilities in industrial automation, laser scanning and safety-component engineering. Asia's 74% share of global industrial robot installations in 2024 supports its long-term demand position.

Europe accounts for approximately 35%–38% of revenue and remains the center of functional-safety expertise, certification capability and premium scanner development. North America represents approximately 18%–21%, supported by warehouse automation, automotive production and integrated safety-system demand. Other regions remain comparatively small and depend mainly on imported products, regional distributors and global automation suppliers.

Competitive Landscape Analysis

The competitive landscape is regionally differentiated. European suppliers lead in independent safety-scanner platforms, functional-safety engineering, long-range models, safety-network integration and outdoor products. Japanese suppliers maintain strong positions in compact industrial sensors, direct factory sales, AGV applications and high-reliability manufacturing. North American competition is more closely linked to broader machine-safety and automation-control portfolios, with an emphasis on system integration and installed customer relationships.

Chinese suppliers are expanding most rapidly in standard 2D products and emerging 3D functional-safety LiDAR. Their competitive advantages include local engineering support, shorter delivery cycles and lower pricing, while their principal constraints remain global certification recognition, international channel coverage and long-term installed-base validation. The market remains moderately concentrated around a limited number of certified platforms, but the supplier base is likely to broaden as regional manufacturers complete certification and gain reference customers.

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Report Scope

This report studies the global Safety Laser Scanners for Robots production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Safety Laser Scanners for Robots 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 Safety Laser Scanners for Robots that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Safety Laser Scanners for Robots total production and demand, 2021-2032, (Units)

Global Safety Laser Scanners for Robots total production value, 2021-2032, (USD Million)

Global Safety Laser Scanners for Robots production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Safety Laser Scanners for Robots consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Safety Laser Scanners for Robots domestic production, consumption, key domestic manufacturers and share

Global Safety Laser Scanners for Robots production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Safety Laser Scanners for Robots production by Scanning Dimension, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Safety Laser Scanners for Robots production by Application, production,

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value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Safety Laser Scanners for Robots 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 SICK AG, KEYENCE CORPORATION, OMRON Corporation, Leuze electronic GmbH + Co. KG, HOKUYO AUTOMATIC CO., LTD., Datasensing S.r.l., Pilz GmbH & Co. KG, IDEC CORPORATION, Banner Engineering Corp., Rockwell Automation, Inc., 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 Safety Laser Scanners for Robots market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (US$/Unit) by manufacturer, by Scanning Dimension, 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 Safety Laser Scanners for Robots Market, By Region:

United States

China

Europe

Japan

South Korea

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ASEAN

India

Rest of World

Market Segmentation

Global Safety Laser Scanners for Robots Market, Segmentation by Scanning Dimension:

2D Planar Safety Laser Scanners

3D Volumetric Safety LiDAR

Global Safety Laser Scanners for Robots Market, Segmentation by Maximum Protective Field Range:

Up to 3.0 m

Above 3.0 m to 6.0 m

Above 6.0 m

Global Safety Laser Scanners for Robots Market, Segmentation by Operating Environment:

Indoor-rated Safety Scanners

Outdoor-capable Safety Scanners

Global Safety Laser Scanners for Robots Market, Segmentation by Application:

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Logistics and Warehousing

Automotive and Transportation Equipment

General Manufacturing and Machinery

Electronics and Semiconductor

Food Beverage and Pharmaceuticals

Others

Companies Profiled:

SICK AG

KEYENCE CORPORATION

OMRON Corporation

Leuze electronic GmbH + Co. KG

HOKUYO AUTOMATIC CO., LTD.

Datasensing S.r.l.

Pilz GmbH & Co. KG

IDEC CORPORATION

Banner Engineering Corp.

Rockwell Automation, Inc.

Tianjin Elco Automation Co., Ltd.

HANGZHOU OLE-SYSTEMS CO., LTD.

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Shenzhen Wonsor Technology Co., Ltd.

Beijing Wanji Technology Co., Ltd.

Key Questions Answered

1. How big is the global Safety Laser Scanners for Robots market?
2. What is the demand of the global Safety Laser Scanners for Robots market?
3. What is the year over year growth of the global Safety Laser Scanners for Robots market?
4. What is the total value of the global Safety Laser Scanners for Robots market?
5. Who are the Major Players in the global Safety Laser Scanners for Robots market?
6. What are the growth factors driving the market demand?

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