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# North America Collaborative Robots Market Size, Share, Trends & Analysis by Payload (Up to 5 Kg, Up to 10 Kg, Above 10 Kg), by Application (Machine Tending, Assembly, Material Handling, Quality Testing, Others), by Industry (Automotive, Electronics & Electrical, Metals & Machining, Food & Beverages, Others), and Region, with Forecasts from 2024 to 2034.

https://marketpublishers.com/r/NB61B51D5A86EN.html
Date: July 2024
Pages: 128
Price: US$ 2,850.00 (Single User License)
ID: NB61B51D5A86EN

## Abstracts

Market Overview

The North America collaborative robots (cobots) market is projected to experience substantial growth, driven by a strong compound annual growth rate (CAGR) of XX.XX% from 2024 to 2034. The market, currently valued at USD XXX.XX million, is expected to reach USD XXXX.XX million by the end of the forecast period. The United States and Canada are leading this market expansion, benefiting from advanced industrial infrastructure and a strong emphasis on automation technologies.

Definition and Scope of Cobots

Collaborative robots, or cobots, are specifically designed for direct human-robot interaction in shared workspaces. Unlike traditional industrial robots that typically operate in isolation, cobots are built to work alongside human workers, enhancing productivity and safety. These robots are characterized by lightweight construction materials, rounded edges, and sophisticated sensors and software that ensure safe and efficient operation. According to the International Federation of Robotics (IFR), robots

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are categorized into industrial robots used for automation and service robots for domestic and professional use. Cobots can be utilized in various applications, from logistics and assembly to machine tending and quality testing. The IFR outlines four levels of human-robot collaboration: coexistence, sequential partnership, cooperation, and responsive collaboration. In many industrial settings, cobots and human workers share the same workspace, completing tasks either independently or sequentially.

Market Drivers

A significant driver for the adoption of cobots in North America is the ongoing shortage of skilled labor. Manufacturing sectors, in particular, face challenges in finding qualified workers. According to Deloitte, by 2034, approximately 2.1 million manufacturing jobs in North America could remain unfilled due to the lack of skilled labor. Cobots offer a viable solution by complementing the existing workforce and automating repetitive and physically demanding tasks, thereby increasing overall productivity and reducing the physical strain on human workers.

Cobots provide a cost-effective automation solution, especially attractive to small and medium-sized enterprises (SMEs). Traditional industrial robots require significant investments in infrastructure, safety measures, and specialized programming. In contrast, cobots involve lower upfront costs, simpler safety requirements, and easier integration into existing production lines. This affordability and ease of use make cobots particularly suitable for SMEs, which constitute a significant portion of the North American economy. By adopting cobots, these enterprises can enhance their operational efficiency and competitiveness without incurring prohibitive costs.

Technological advancements are another key driver of the cobots market in North America. The emergence of Industry 4.0 and the increasing digital transformation of industries are accelerating the adoption of cobots. The Industrial Internet of Things (IIoT) enables cobots to connect with other machinery, improving precision, flexibility, and efficiency. Innovations such as 5G network capabilities enhance the service quality of automation by optimizing mobile network resource usage. Furthermore, advancements in artificial intelligence (AI) allow cobots to perform complex tasks that require decision-making and adaptability, thereby broadening their range of applications.

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Market Restraints

Despite their numerous advantages, cobots face certain limitations that could hinder market growth. One significant restraint is their lower power efficiency and speed compared to traditional industrial robots. Cobots generally operate at speeds of around 1 meter per second, which is slower than traditional robots with similar payload capacities. This speed limitation restricts their use in heavy-duty manufacturing processes, where higher speed and power are critical. Consequently, industries that require high-speed automation may still prefer traditional industrial robots, limiting the market potential for cobots.

Opportunities

The adoption of cobots in SMEs represents a significant opportunity for market growth in North America. SMEs, which make up a substantial portion of the business landscape, can benefit immensely from the affordability, flexibility, and ease of integration offered by cobots. These robots require minimal infrastructure changes and can be quickly reprogrammed and reconfigured to meet changing production needs. This adaptability makes cobots an attractive automation solution for SMEs, enabling them to enhance productivity, respond to market fluctuations, and achieve higher efficiency with lower costs.

Market Segmentation Analysis

By Payload

Up to 5 Kg

Up to 10 Kg

Above 10 Kg

Cobots with a payload capacity of up to 5 Kg are expected to dominate the market, owing to their versatility and cost-effectiveness. These lighter cobots are easier to program and integrate into various industrial processes, making them ideal for applications requiring precision and flexibility.

By Application

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Machine Tending

Assembly

Material Handling

Quality Testing

Others

The assembly segment is anticipated to lead the market, driven by its ability to handle both repetitive tasks and complex assembly processes. Cobots in assembly applications enhance productivity and precision, making them a valuable asset in manufacturing.

By Industry

Automotive

Electronics & Electrical

Metals & Machining

Food & Beverages

Others

The automotive industry is a key end-user, accounting for a significant market share. Collaborative robots in automotive manufacturing improve safety, accuracy, and efficiency, contributing to enhanced productivity and reduced operational costs.

Regional Analysis

United States

Canada

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Mexico

The United States and Canada are the primary markets for cobots in North America, driven by advanced industrial infrastructure and a strong focus on automation technologies. These countries are at the forefront of adopting cobot technologies, supported by substantial investments in R&D and a robust manufacturing base. The integration of cobots into smart manufacturing environments, leveraging IIoT and AI, further enhances their adoption and application across various industries.

Competitive Landscape

The North American collaborative robots market features several prominent players, including:

Universal Robots A/S

FANUC America Corporation

Rethink Robotics GmbH

Aubo Robotics USA. Inc

ABB Ltd.

Kawasaki Heavy Industries, Ltd.

Brooks Automation, Inc.

Omron Corporation

Festo Corporation

F&P Robotics

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