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Stretch-Wrapping Robots Market Forecasts to 2032 – Global Analysis By Type (Mobile/Autonomous Robotic Stretch Wrappers, Robotic Arm Integrated Wrapping Cells, Turntable Robotic Hybrid Systems, Orbital Robotic Wrappers and Other Types), Automation Level (Fully-Automatic Robotic Systems, Semi-Automatic Robotic Systems and Manual Robotic Systems), Payload, Component, Sales Channel, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Stretch-Wrapping Robots Market is accounted for $1.48 billion in 2025 and is expected to reach $2.57 billion by 2032 growing at a CAGR of 8.2% during the forecast period. Stretch-wrapping robots are automated systems designed to apply stretch film around palletized goods, enhancing load stability and protection during storage or transit. These robots streamline packaging operations by navigating around the load or rotating it, ensuring uniform film coverage. Equipped with programmable controls and sensors, they optimize film usage, reduce manual labor, and improve throughput. Commonly used in logistics, manufacturing, and warehousing, stretch-wrapping robots support consistent, high-efficiency wrapping for diverse product dimensions and handling requirements.

According to study published in Procedia Manufacturing Stretch-wrapping robots have demonstrated a 40% reduction in film usage and a 25% improvement in load containment consistency compared to semi-automatic systems.

Market Dynamics:

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Driver:

Massive expansion of online retail and global logistics

Stretch-wrapping robots are increasingly deployed in distribution centers and warehouses to streamline palletizing operations and ensure consistent load stability. As retailers scale up fulfillment capabilities to meet rising consumer expectations, robotic wrapping systems offer speed, precision and reduced labor dependency. Additionally, the surge in cross-border trade and just-in-time delivery models is accelerating the adoption of robotic stretch-wrapping technologies across logistics hubs making them indispensable in high-volume environments.

Restraint:

Installing and integrating robotic systems

Retrofitting existing lines with robotic systems often requires substantial capital investment and technical expertise, which can deter small and mid-sized enterprises. Moreover, aligning robotic platforms with diverse packaging formats and varying load profiles demands customized programming and calibration. Downtime during installation and the need for skilled personnel to manage robotic interfaces further complicate deployment. These factors collectively slow market penetration, especially in regions with limited automation readiness or constrained budgets.

Opportunity:

Fast-growing manufacturing and logistics sectors

As production volumes rise and supply chains become more complex, manufacturers are prioritizing automation to maintain packaging consistency and reduce operational bottlenecks. Stretch-wrapping robots are being integrated into smart factories and automated warehouses to support lean manufacturing and agile distribution strategies. Emerging economies are witnessing a surge in infrastructure development, prompting investments in robotic packaging systems to meet export standards and reduce manual labor.

Threat:

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Evolving safety and environmental standards

Manufacturers must ensure that robotic systems meet stringent workplace safety norms, including collision avoidance, load stability, and operator protection. Additionally, environmental mandates are pushing companies to adopt energy-efficient robots and recyclable wrapping materials. Failure to comply with these evolving standards can lead to penalties, product recalls, or reputational damage. The need for continuous upgrades and certification adds to operational costs, posing a challenge for manufacturers aiming to scale quickly.

Covid-19 Impact:

The COVID-19 pandemic disrupted global supply chains, prompting a reevaluation of automation strategies in packaging and logistics. Stretch-wrapping robots gained traction as companies sought to minimize human contact and maintain operational continuity amid labor shortages. Demand surged in essential sectors such as food, pharmaceuticals, and e-commerce, where packaging speed and hygiene became critical. However, initial lockdowns and travel restrictions delayed equipment installations and hampered component availability.

The turntable robotic hybrid systems segment is expected to be the largest during the forecast period

The turntable robotic hybrid systems segment is expected to account for the largest market share during the forecast period due to their versatility and cost-effectiveness. These systems combine mechanical turntables with robotic arms to wrap pallets efficiently, accommodating a wide range of load sizes and shapes. Their modular design allows easy integration into existing packaging lines, making them ideal for high-throughput environments. Industries such as food & beverage, consumer goods and automotive favor these systems for their reliability and adaptability.

The control systems & HMI segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the control systems & HMI segment is predicted to witness the highest growth rate driven by advancements in intuitive software and real-time monitoring capabilities. These components enable operators to configure wrapping parameters, troubleshoot issues, and optimize performance with minimal training. Enhanced connectivity features such as IoT integration and remote diagnostics are

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transforming stretch-wrapping robots into smart packaging assets. The segment is also witnessing growth due to rising demand for user-friendly interfaces that reduce setup time and improve operational transparency.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share fueled by robust industrial growth and expanding logistics infrastructure. Countries like China, India, and South Korea are investing heavily in automation to support export-driven manufacturing and e-commerce fulfillment. The region's dense population and rising consumer demand are prompting large-scale deployment of stretch-wrapping robots in retail and distribution centers. Government initiatives promoting smart manufacturing and labor efficiency are further accelerating adoption.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR owing to strong technological innovation and early adoption of automation. The region's emphasis on operational efficiency, labor cost reduction, and workplace safety is driving demand for advanced stretch-wrapping solutions. Logistics providers and manufacturers are increasingly integrating robotic systems to meet stringent packaging standards and improve throughput. The rise of omnichannel retail and last-mile delivery services is also contributing to market expansion.

Key players in the market

Some of the key players in Stretch-Wrapping Robots Market include Robopac USA, Lantech, Phoenix Wrappers, Wulftec International Inc., Cousins Packaging Inc., Arpac LLC, Aetna Group, Italdibipack S.p.A., Atlanta Stretch S.p.A., Fromm Packaging Systems Inc., ABB Robotics, Matco International, Orion Packaging Systems LLC, Webster Griffin, Slat S.p.A., Packway Inc., Signode Industrial Group LLC, Reisopack, Wonyoung Automation Co., Ltd., and Caleidon S.r.l.

Key Developments:

In September 2025, ABB Robotics released OmniCore EyeMotion, enabling real-time vision and autonomous path planning for robots. The software integrates with third-party sensors and reduces commissioning time by 90%.

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In June 2025, Aetna Group signed a five-year framework agreement with the University of Bologna to advance packaging research. The partnership aims to foster innovation in sustainable and automated packaging technologies.

In May 2025, Wulftec International Inc. unveiled a new automated turntable system featuring a compression top platen for enhanced load stability. This innovation targets high-volume pallet wrapping in food and beverage sectors. The system was showcased at PACK EXPO 2025.

Types Covered:

- Mobile/Autonomous Robotic Stretch Wrappers
- Robotic Arm Integrated Wrapping Cells
- Turntable Robotic Hybrid Systems
- Orbital Robotic Wrappers
- Other Types

Automation Levels Covered:

- Fully-Automatic Robotic Systems
- Semi-Automatic Robotic Systems
- Manual Robotic Systems

Payloads Covered:

- Low Volume (?30 loads/day)
- Medium Volume (31–120 loads/day)
- High Volume (>120 loads/day)

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Components Covered:

- Robot Platform
- Film Carriage & Pre-Stretch Unit
- Control Systems & HMI
- Integration & Peripheral Conveyors
- Installation, Maintenance & Spare Parts
- Other Components

Sales Channels Covered:

- OEM Direct Sales
- Distributors & System Integrators
- Aftermarket

End Users Covered:

- Food & Beverage
- E-commerce & Warehousing
- Pharmaceuticals & Healthcare
- Automotive & Industrial Goods
- Consumer Packaged Goods (CPG)
- Building Materials & Construction
- Other End Users

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Regions Covered:

- North America
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  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea

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Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

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All the customers of this report will be entitled to receive one of the following free customization options:

- Company Profiling
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- Regional Segmentation
  - Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)
- Competitive Benchmarking
  - Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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