

Welding Automation Market Forecasts to 2034 – Global Analysis By Equipment (Welding Robots, Positioners, Controllers, Welding Cells and Other Equipments), Welding Process, Automation Level, Application, Industry and Geography

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Abstracts

According to Statistics MRC, the Global Welding Automation Market is accounted for \$11.5 billion in 2026 and is expected to reach \$28.2 billion by 2034 growing at a CAGR of 11.9% during the forecast period. Welding automation refers to the use of robotic systems, automated equipment, sensors, and control technologies to perform welding operations with minimal human intervention. Automated welding systems improve precision, consistency, productivity, and quality while reducing labor costs and workplace safety risks. These solutions are widely used in industries such as automotive, aerospace, shipbuilding, construction, and heavy manufacturing. Advanced welding automation integrates artificial intelligence, machine vision, and real-time monitoring to optimize welding parameters and ensure defect-free production. Increasing industrial automation and demand for high-quality manufacturing are driving growth in welding automation technologies worldwide.

Market Dynamics:

Driver:

Rising demand for weld consistency

Automotive, aerospace, and heavy equipment manufacturers are placing greater emphasis on achieving uniform weld quality across high-volume production environments. Variations in manual welding can lead to defects, rework costs, and

product performance issues, making automated welding systems increasingly attractive. Automated solutions deliver repeatable welding parameters that improve joint strength and dimensional accuracy. Industries producing safety-critical components particularly benefit from enhanced process reliability and traceability. The ability to maintain consistent output while reducing production variability is becoming a key competitive advantage. This shift is encouraging wider deployment of automated welding technologies across manufacturing facilities.

Restraint:

High robotic welding investments

Advanced welding cells often require substantial expenditure on robotic systems, sensors, control software, safety infrastructure, and integration services. Small and medium-sized manufacturers may find it difficult to justify these costs without sufficient production volumes. Customization requirements for different welding applications can further increase capital commitments. Workforce training and ongoing maintenance expenses also add to implementation costs. Companies must carefully evaluate return-on-investment timelines before proceeding with automation projects. These financial considerations can delay adoption among cost-sensitive manufacturers.

Opportunity:

AI-enabled welding quality control

Machine learning algorithms can analyze weld characteristics in real time to identify defects, process deviations, and quality inconsistencies during production. Advanced vision systems allow manufacturers to monitor weld integrity without relying solely on post-production inspection. AI-driven analytics can also recommend parameter adjustments that improve process stability and output quality. Such capabilities help reduce scrap rates while enhancing productivity and compliance with quality standards. The integration of intelligent inspection systems is transforming how manufacturers manage welding operations. This evolution is expanding the value proposition of automated welding solutions.

Threat:

Equipment downtime operational risks

Unexpected failures in robotic systems, welding power sources, or control software can disrupt production schedules and affect manufacturing efficiency. Highly automated production lines often depend on continuous equipment availability to meet output targets. Even short periods of downtime can lead to missed deliveries and increased operational costs. Troubleshooting complex automated systems may require specialized technical expertise and replacement components. Production disruptions can be particularly costly in industries operating under tight manufacturing schedules. Such risks encourage companies to invest heavily in maintenance and system reliability programs.

Covid-19 Impact:

The COVID-19 pandemic accelerated interest in automation technologies within manufacturing environments. Labor shortages, workplace safety requirements, and social distancing measures highlighted the advantages of automated welding operations. Many manufacturers explored robotic welding solutions to reduce dependency on manual labor and improve production continuity. Temporary supply chain disruptions initially affected equipment procurement and project implementation schedules. However, industrial recovery programs encouraged investments in advanced manufacturing technologies. Companies increasingly prioritized automation as part of broader operational resilience strategies. These developments supported renewed growth in the welding automation market.

The robotic automation segment is expected to be the largest during the forecast period

The robotic automation segment is expected to account for the largest market share during the forecast period as industrial robots provide unmatched precision, repeatability, and productivity in welding applications. Robotic systems can perform complex welding tasks with consistent quality across extended production runs. Manufacturers rely on these solutions to improve throughput while minimizing human error and material waste. The technology is extensively utilized in automotive assembly, heavy machinery production, and metal fabrication industries. Advancements in robotic programming and sensor integration continue to enhance operational flexibility. Their ability to support high-volume manufacturing requirements sustains strong commercial demand.

The flexible automation segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the flexible automation segment is predicted to witness the highest growth rate due to manufacturers seeking production systems capable of adapting quickly to changing product designs and batch sizes. Flexible welding platforms enable rapid reconfiguration without extensive equipment modifications or prolonged downtime. This capability is particularly valuable in industries producing customized or low-volume components. Modern manufacturing strategies increasingly prioritize agility and responsiveness over fixed production structures. Flexible automation also supports mixed-model manufacturing environments where product variation is common. Continued advances in software-driven process control are making these systems more accessible.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share owing to its position as a global manufacturing hub for automotive, electronics, shipbuilding, and industrial machinery production. Large-scale factories across the region are investing in automation technologies to improve productivity and address labor-related challenges. Strong industrial output creates sustained demand for advanced welding systems and robotic solutions. Countries such as China, Japan, South Korea, and India continue expanding their manufacturing capabilities through modernization initiatives. The presence of major equipment manufacturers further strengthens regional market development. Continuous investments in industrial automation infrastructure support long-term growth.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR driven by government-backed industrial modernization programs. Manufacturers are increasingly integrating robotics, artificial intelligence, and connected production systems into welding operations. Rising investments in electric vehicle manufacturing and advanced infrastructure projects are generating new demand for automated welding equipment. Emerging economies within the region are upgrading production facilities to meet international quality and productivity standards. Expanding industrial automation ecosystems are creating favorable conditions for technology deployment. Strong capital investment across manufacturing sectors continues to stimulate market activity.

Key players in the market

Some of the key players in Welding Automation Market include ABB Ltd., FANUC Corporation, Yaskawa Electric Corporation, KUKA AG, Lincoln Electric Holdings, Inc., ESAB Corporation, Panasonic Holdings Corporation, Fronius International GmbH, Illinois Tool Works Inc., TRUMPF SE + Co. KG, Mitsubishi Electric Corporation, Nachi-Fujikoshi Corp., Comau S.p.A., Kawasaki Heavy Industries, Ltd. and Daihen Corporation.

Key Developments:

In May 2026, ESAB Corporation reported record-breaking first-quarter 2026 financial results, posting total sales of \$746 million which marks a strong 10 percent increase on a reported basis compared to the prior year. This commercial momentum is heavily accelerated by the company's ongoing manufacturing 'compounder' journey and the stellar performance of its recent strategic acquisitions, with newly integrated automated welding and cutting brands EWM and Aktiv both delivering double-digit revenue growth.

In April 2026, Fronius International GmbH expanded its manual and automated welding portfolios by introducing its new high-performance Fortis and TPS/i manual systems alongside next-generation automated components. This product rollout emphasizes precision and process flexibility on the shop floor, using advanced localized digital control loops to stabilize the welding arc, which helps industrial fabrication teams drastically reduce post-weld rework and ensure consistent bead quality across high-stress structural joints.

Equipments Covered:

Welding Robots

Positioners

Controllers

Welding Cells

Other Equipments

Welding Processes Covered:

Arc Welding

Resistance Welding

Laser Welding

Spot Welding

Other Welding Processes

Automation Levels Covered:

Fixed Automation

Programmable Automation

Flexible Automation

Robotic Automation

Other Automation Levels

Applications Covered:

Body Assembly

Structural Fabrication

Pipe Welding

Component Joining

Other Applications

End Users Covered:

Automotive

Aerospace & Defense

Shipbuilding

Heavy Machinery

Other Industries

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of 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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

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

Free Customization Offerings:

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

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

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

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL WELDING AUTOMATION MARKET, BY EQUIPMENT

- 5.1 Welding Robots
- 5.2 Positioners
- 5.3 Controllers
- 5.4 Welding Cells
- 5.5 Other Equipments

6 GLOBAL WELDING AUTOMATION MARKET, BY WELDING PROCESS

- 6.1 Arc Welding
- 6.2 Resistance Welding
- 6.3 Laser Welding
- 6.4 Spot Welding
- 6.5 Other Welding Processes

7 GLOBAL WELDING AUTOMATION MARKET, BY AUTOMATION LEVEL

- 7.1 Fixed Automation
- 7.2 Programmable Automation
- 7.3 Flexible Automation
- 7.4 Robotic Automation
- 7.5 Other Automation Levels

8 GLOBAL WELDING AUTOMATION MARKET, BY APPLICATION

- 8.1 Body Assembly
- 8.2 Structural Fabrication
- 8.3 Pipe Welding
- 8.4 Component Joining
- 8.5 Other Applications

9 GLOBAL WELDING AUTOMATION MARKET, BY INDUSTRY

- 9.1 Automotive

9.2 Aerospace & Defense

9.3 Shipbuilding

9.4 Heavy Machinery

9.5 Other Industries

10 GLOBAL WELDING AUTOMATION MARKET, BY GEOGRAPHY

10.1 North America

10.1.1 United States

10.1.2 Canada

10.1.3 Mexico

10.2 Europe

10.2.1 United Kingdom

10.2.2 Germany

10.2.3 France

10.2.4 Italy

10.2.5 Spain

10.2.6 Netherlands

10.2.7 Belgium

10.2.8 Sweden

10.2.9 Switzerland

10.2.10 Poland

10.2.11 Rest of Europe

10.3 Asia Pacific

10.3.1 China

10.3.2 Japan

10.3.3 India

10.3.4 South Korea

10.3.5 Australia

10.3.6 Indonesia

10.3.7 Thailand

10.3.8 Malaysia

10.3.9 Singapore

10.3.10 Vietnam

10.3.11 Rest of Asia Pacific

10.4 South America

10.4.1 Brazil

10.4.2 Argentina

10.4.3 Colombia

- 10.4.4 Chile
- 10.4.5 Peru
- 10.4.6 Rest of South America
- 10.5 Rest of the World (RoW)
 - 10.5.1 Middle East
 - 10.5.1.1 Saudi Arabia
 - 10.5.1.2 United Arab Emirates
 - 10.5.1.3 Qatar
 - 10.5.1.4 Israel
 - 10.5.1.5 Rest of Middle East
 - 10.5.2 Africa
 - 10.5.2.1 South Africa
 - 10.5.2.2 Egypt
 - 10.5.2.3 Morocco
 - 10.5.2.4 Rest of Africa

11 STRATEGIC MARKET INTELLIGENCE

- 11.1 Industry Value Network and Supply Chain Assessment
- 11.2 White-Space and Opportunity Mapping
- 11.3 Product Evolution and Market Life Cycle Analysis
- 11.4 Channel, Distributor, and Go-to-Market Assessment

12 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

- 12.1 Mergers and Acquisitions
- 12.2 Partnerships, Alliances, and Joint Ventures
- 12.3 New Product Launches and Certifications
- 12.4 Capacity Expansion and Investments
- 12.5 Other Strategic Initiatives

13 COMPANY PROFILES

- 13.1 ABB Ltd.
- 13.2 FANUC Corporation
- 13.3 Yaskawa Electric Corporation
- 13.4 KUKA AG
- 13.5 Lincoln Electric Holdings, Inc.
- 13.6 ESAB Corporation

- 13.7 Panasonic Holdings Corporation
- 13.8 Fronius International GmbH
- 13.9 Illinois Tool Works Inc.
- 13.10 TRUMPF SE + Co. KG
- 13.11 Mitsubishi Electric Corporation
- 13.12 Nachi-Fujikoshi Corp.
- 13.13 Comau S.p.A.
- 13.14 Kawasaki Heavy Industries, Ltd.
- 13.15 Daihen Corporation

List Of Tables

LIST OF TABLES

Table 1 Global Welding Automation Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Welding Automation Market, By Equipment (2023–2034) (\$MN)

Table 3 Global Welding Automation Market, By Welding Robots (2023–2034) (\$MN)

Table 4 Global Welding Automation Market, By Positioners (2023–2034) (\$MN)

Table 5 Global Welding Automation Market, By Controllers (2023–2034) (\$MN)

Table 6 Global Welding Automation Market, By Welding Cells (2023–2034) (\$MN)

Table 7 Global Welding Automation Market, By Other Equipments (2023–2034) (\$MN)

Table 8 Global Welding Automation Market, By Welding Process (2023–2034) (\$MN)

Table 9 Global Welding Automation Market, By Arc Welding (2023–2034) (\$MN)

Table 10 Global Welding Automation Market, By Resistance Welding (2023–2034) (\$MN)

Table 11 Global Welding Automation Market, By Laser Welding (2023–2034) (\$MN)

Table 12 Global Welding Automation Market, By Spot Welding (2023–2034) (\$MN)

Table 13 Global Welding Automation Market, By Other Welding Processes (2023–2034) (\$MN)

Table 14 Global Welding Automation Market, By Automation Level (2023–2034) (\$MN)

Table 15 Global Welding Automation Market, By Fixed Automation (2023–2034) (\$MN)

Table 16 Global Welding Automation Market, By Programmable Automation (2023–2034) (\$MN)

Table 17 Global Welding Automation Market, By Flexible Automation (2023–2034) (\$MN)

Table 18 Global Welding Automation Market, By Robotic Automation (2023–2034) (\$MN)

Table 19 Global Welding Automation Market, By Other Automation Levels (2023–2034) (\$MN)

Table 20 Global Welding Automation Market, By Application (2023–2034) (\$MN)

Table 21 Global Welding Automation Market, By Body Assembly (2023–2034) (\$MN)

Table 22 Global Welding Automation Market, By Structural Fabrication (2023–2034) (\$MN)

Table 23 Global Welding Automation Market, By Pipe Welding (2023–2034) (\$MN)

Table 24 Global Welding Automation Market, By Component Joining (2023–2034) (\$MN)

Table 25 Global Welding Automation Market, By Other Applications (2023–2034) (\$MN)

Table 26 Global Welding Automation Market, By Industry (2023–2034) (\$MN)

Table 27 Global Welding Automation Market, By Automotive (2023–2034) (\$MN)

Table 28 Global Welding Automation Market, By Aerospace & Defense (2023–2034) (\$MN)

Table 29 Global Welding Automation Market, By Shipbuilding (2023–2034) (\$MN)

Table 30 Global Welding Automation Market, By Heavy Machinery (2023–2034) (\$MN)

Table 31 Global Welding Automation Market, By Other Industries (2023–2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) are also represented in the same manner as above.

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