

Vietnam Robotics Market By Component (Hardware, Software), By Type (Articulated, Cartesian, SCARA, Cylindrical, Others), By End User (Healthcare, Media & Entertainment, Aerospace & Defence, Logistics, Automotive, Others), By Region, Competition, Forecast & Opportunities, 2019-2029F

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Abstracts

Vietnam Robotics Market was valued at USD 420 Million in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 4.5% through 2029. The Vietnam Robotics Market is witnessing robust growth, driven by the country's rapid industrialization, increased adoption of automation technologies, and favorable government policies promoting Industry 4.0. As manufacturers seek to enhance productivity and competitiveness, the demand for industrial robots in sectors such as electronics, automotive, and textiles is surging. Additionally, the rise of e-commerce and logistics industries is fueling the need for robotics solutions in warehousing and supply chain management. The Vietnamese government's initiatives, including tax incentives and investment in smart manufacturing, are further accelerating market growth. Key players are expanding their presence and capabilities, introducing advanced robotics technologies tailored to local industry needs. With ongoing investments in infrastructure and education to build a skilled workforce, the Vietnam Robotics Market is poised for sustained expansion, offering significant opportunities for innovation and development.

Key Market Drivers

Rapid Industrialization and Economic Growth

Vietnam's rapid industrialization and robust economic growth are major drivers of the

robotics market. The country has become an attractive destination for manufacturing due to its favorable economic policies, cost-effective labor, and strategic location in Southeast Asia. As Vietnam transitions from a predominantly agricultural economy to an industrialized one, there is a significant increase in manufacturing activities across various sectors such as electronics, textiles, automotive, and consumer goods. This industrial boom is driving the need for advanced automation solutions, including robotics, to enhance productivity, efficiency, and quality in manufacturing processes. Robots help manufacturers meet the rising demand for goods while maintaining competitive production costs. Additionally, the Vietnamese government's focus on attracting foreign direct investment (FDI) has resulted in the establishment of numerous industrial zones and manufacturing facilities by multinational corporations, further fueling the demand for robotics. As industrialization continues to advance, the need for sophisticated robotics solutions to streamline operations, reduce labor costs, and improve output quality will drive significant growth in the Vietnam Robotics Market.

Government Support and Incentives

The Vietnamese government's strong support and incentives for technological advancement and Industry 4.0 adoption are crucial drivers of the robotics market. Recognizing the importance of automation and digital transformation for economic development, the government has implemented policies and programs to promote the adoption of robotics and other advanced technologies. Initiatives such as tax incentives, subsidies for research and development, and investments in infrastructure and smart manufacturing are encouraging businesses to integrate robotics into their operations. Additionally, the government's commitment to developing high-tech industrial parks and innovation hubs provides a conducive environment for the growth of the robotics industry. Educational reforms and vocational training programs aimed at building a skilled workforce proficient in robotics and automation technologies further support the market's expansion. This governmental backing not only facilitates the adoption of robotics but also attracts foreign investment and expertise, positioning Vietnam as a burgeoning hub for robotic technology in Southeast Asia.

Rising Labor Costs and Workforce Shortages

Increasing labor costs and workforce shortages are significant drivers of the robotics market in Vietnam. As the economy grows and industrial activities expand, the demand for skilled labor in manufacturing and production processes has surged. However, the availability of such labor has not kept pace, leading to higher wages and a labor shortage. This imbalance creates a pressing need for automation to fill the gap and

maintain production efficiency. Robots offer a viable solution to these challenges by performing repetitive, labor-intensive tasks with high precision and consistency, thereby reducing dependency on human labor. The adoption of robotics helps businesses manage labor costs, address workforce shortages, and improve operational efficiency. Moreover, as companies seek to maintain their competitive edge in the global market, investing in robotics becomes essential for enhancing productivity and ensuring consistent quality in production. The trend of rising labor costs and workforce shortages is likely to continue, further driving the adoption of robotics in Vietnam's industrial landscape.

Technological Advancements and Innovation

Technological advancements and continuous innovation in robotics are pivotal drivers of the Vietnam Robotics Market. The global robotics industry is experiencing rapid developments in artificial intelligence (AI), machine learning, sensors, and automation technologies, making robots more intelligent, flexible, and efficient. These advancements enable the deployment of robots in a wider range of applications beyond traditional manufacturing, such as logistics, healthcare, agriculture, and services. In Vietnam, the adoption of these cutting-edge technologies is accelerating as businesses recognize the benefits of integrating advanced robotics solutions into their operations. For instance, AI-powered robots can optimize production processes, perform complex tasks, and adapt to changing environments, thereby enhancing productivity and reducing operational costs. The availability of more sophisticated and affordable robotic systems also lowers the entry barriers for small and medium-sized enterprises (SMEs), enabling broader adoption across various industries. Continuous innovation in robotics technology will drive further growth in the Vietnam Robotics Market by expanding the range of applications and improving the efficiency and effectiveness of robotic solutions.

Growth of E-commerce and Logistics Industries

The growth of e-commerce and logistics industries is a significant driver of the Vietnam Robotics Market. With the rise of online shopping and the increasing demand for fast, reliable delivery services, logistics companies are under pressure to optimize their operations and meet customer expectations. Robotics solutions, such as automated guided vehicles (AGVs), robotic sorting systems, and warehouse automation, are essential for enhancing efficiency, accuracy, and speed in logistics and supply chain management. In Vietnam, the e-commerce sector has been experiencing exponential growth, driven by increased internet penetration, mobile commerce, and changing consumer behaviors. This growth necessitates the adoption of robotics to manage high

volumes of orders, streamline warehouse operations, and ensure timely deliveries. Furthermore, the integration of robotics in logistics helps companies reduce labor costs, minimize errors, and improve inventory management. As the e-commerce and logistics industries continue to expand, the demand for advanced robotics solutions will drive significant growth in the Vietnam Robotics Market, enabling businesses to keep pace with the evolving market dynamics and customer expectations.

Key Market Challenges

High Initial Investment Costs

The Vietnam Robotics Market is the high initial investment costs associated with acquiring and implementing robotic systems. The upfront expenses for purchasing advanced robots, integrating them into existing workflows, and maintaining them can be prohibitive, especially for small and medium-sized enterprises (SMEs). Many businesses in Vietnam operate with limited capital and tight budgets, making it difficult to justify the substantial financial outlay required for robotics. Additionally, the costs extend beyond the robots themselves to include necessary infrastructure upgrades, such as enhanced digital networks and facilities capable of supporting robotic operations. The economic disparity between urban and rural areas further exacerbates this issue, as companies in less developed regions may lack the financial resources to invest in such advanced technology. This high cost barrier can slow down the adoption rate of robotics, limiting its benefits to larger corporations with significant capital reserves, and potentially widening the technological gap between large and small enterprises within the country.

Limited Skilled Workforce

The limited availability of a skilled workforce proficient in robotics and automation technologies poses a considerable challenge to the Vietnam Robotics Market. While the country is making strides in education and vocational training, there remains a significant gap in the number of professionals equipped with the necessary skills to design, operate, and maintain robotic systems. This skills shortage is particularly pronounced in areas such as programming, systems integration, and technical support, which are crucial for the successful deployment and operation of advanced robotics. The rapid pace of technological advancements also means that continuous learning and upskilling are required to keep up with the latest developments in robotics. Without a robust talent pool, businesses may struggle to implement and optimize robotic solutions effectively, leading to suboptimal performance and underutilization of technology. This

challenge underscores the need for enhanced educational initiatives, industry-academia partnerships, and government-led programs aimed at building a workforce capable of supporting the burgeoning robotics industry in Vietnam.

Technological Integration and Compatibility Issues

The Vietnam Robotics Market is the integration and compatibility of new robotic technologies with existing systems and processes. Many Vietnamese businesses, especially those in traditional industries, operate with legacy systems that may not be easily compatible with modern robotic solutions. The process of integrating robots into these environments can be complex and time-consuming, requiring significant modifications to existing workflows, data systems, and physical infrastructure. Additionally, the interoperability of different robotic systems and software platforms can pose challenges, as businesses may need to invest in additional middleware or bespoke solutions to ensure seamless operation. These integration issues can lead to disruptions in production, increased costs, and delayed implementation timelines, thereby hindering the overall efficiency gains expected from robotics. Overcoming these technological barriers requires not only substantial financial investment but also specialized expertise in systems integration, which may be scarce in the Vietnamese market. Addressing these challenges is crucial for maximizing the benefits of robotics and achieving smooth, efficient, and scalable automation across various industries.

Cybersecurity Risks

The increasing adoption of robotics and automation technologies in Vietnam also brings heightened cybersecurity risks. As robots become more integrated into manufacturing, logistics, healthcare, and other critical sectors, they become potential targets for cyberattacks. These attacks can range from data breaches and intellectual property theft to more severe disruptions of operational processes, which can have catastrophic consequences for businesses. The interconnected nature of modern robotic systems, often linked to cloud platforms and Internet of Things (IoT) networks, amplifies these risks, as vulnerabilities in one part of the system can be exploited to affect others. Furthermore, the cybersecurity infrastructure in many Vietnamese businesses may not be sufficiently robust to counter these sophisticated threats. The lack of awareness and preparedness for cybersecurity challenges can lead to significant financial losses, reputational damage, and operational downtime. To mitigate these risks, businesses must invest in comprehensive cybersecurity strategies, including regular risk assessments, employee training, and the deployment of advanced security technologies. Ensuring robust cybersecurity measures is essential for protecting the

integrity and reliability of robotic systems and fostering trust in their widespread adoption across Vietnam.

Key Market Trends

Increasing Adoption of Collaborative Robots (Cobots)

One of the prominent trends in the Vietnam Robotics Market is the increasing adoption of collaborative robots, commonly known as cobots. Unlike traditional industrial robots, which often require extensive safety measures and operate in isolated environments, cobots are designed to work alongside human workers safely and efficiently. This trend is driven by the need for flexible and adaptable automation solutions that can enhance productivity without requiring significant changes to existing workflows or environments. Cobots are particularly appealing to small and medium-sized enterprises (SMEs) in Vietnam, which may not have the resources to implement large-scale automation. These robots can handle repetitive, mundane tasks, allowing human workers to focus on more complex and value-added activities. Moreover, the ease of programming and deploying cobots, along with their relatively lower cost compared to traditional robots, makes them an attractive option for businesses looking to gradually adopt automation. As Vietnamese industries continue to modernize, the use of cobots is expected to grow, driven by their ability to improve efficiency, enhance safety, and support human workers in a collaborative manner.

Integration of Artificial Intelligence and Machine Learning

The integration of artificial intelligence (AI) and machine learning (ML) into robotics is a significant trend shaping the Vietnam Robotics Market. AI and ML technologies enable robots to perform more complex tasks, learn from their environment, and make data-driven decisions. This trend is particularly impactful in manufacturing, logistics, healthcare, and service sectors, where robots equipped with AI can optimize operations, improve accuracy, and reduce downtime. For example, in manufacturing, AI-powered robots can predict equipment failures and perform preventive maintenance, thereby minimizing disruptions. In logistics, AI enables robots to efficiently manage inventory, optimize routes, and handle complex sorting tasks. The healthcare sector benefits from AI-integrated robots through improved precision in surgeries and enhanced patient care services. As AI and ML technologies continue to advance, their integration into robotics will drive significant improvements in automation capabilities and efficiency. Vietnamese businesses are increasingly investing in AI-driven robotic solutions to stay competitive and capitalize on the benefits of intelligent automation.

Expansion of Robotics in E-commerce and Logistics

The expansion of robotics in the e-commerce and logistics sectors is a notable trend in the Vietnam Robotics Market. With the rapid growth of e-commerce, driven by increased internet penetration and changing consumer behaviors, there is a rising demand for efficient and scalable logistics solutions. Robotics plays a crucial role in addressing this demand by automating various aspects of the supply chain, from warehousing and inventory management to order fulfillment and last-mile delivery. Automated guided vehicles (AGVs), robotic sorters, and warehouse robots are becoming integral components of logistics operations, enhancing speed, accuracy, and efficiency. For instance, robotic systems can streamline the picking and packing process in warehouses, reducing the time taken to process orders and minimizing errors. The use of drones and autonomous delivery robots for last-mile delivery is also gaining traction, particularly in urban areas. As e-commerce continues to expand in Vietnam, the integration of robotics in logistics will be essential for businesses to meet customer expectations for fast and reliable delivery services, driving further growth in the robotics market.

Growth of Robotics in Healthcare

The growth of robotics in the healthcare sector is a significant trend in the Vietnam Robotics Market. Healthcare robots are increasingly being deployed to assist with surgeries, patient care, rehabilitation, and hospital logistics. Surgical robots, for example, offer enhanced precision and control during complex procedures, leading to better patient outcomes and reduced recovery times. In patient care, robots are used for tasks such as medication delivery, patient monitoring, and assisting elderly or disabled individuals with daily activities. The COVID-19 pandemic has accelerated the adoption of robotics in healthcare, as robots can minimize human contact and reduce the risk of infection. For instance, disinfection robots are used to sanitize hospital environments, while telepresence robots enable remote consultations and patient interactions. The growing demand for advanced medical services and the need to address challenges such as an aging population and healthcare workforce shortages are driving the adoption of robotics in the healthcare sector. As technology continues to evolve, the role of robots in enhancing healthcare delivery and improving patient care in Vietnam is expected to expand significantly.

Development of Local Robotics Startups and Innovation Ecosystem

The development of local robotics startups and a burgeoning innovation ecosystem is an emerging trend in the Vietnam Robotics Market. Vietnam's entrepreneurial landscape is witnessing a surge in tech startups, many of which are focused on robotics and automation. These startups are driving innovation by developing cost-effective, tailored robotic solutions that cater to the specific needs of Vietnamese industries. The growth of robotics startups is supported by a conducive ecosystem that includes tech incubators, accelerators, venture capital, and government initiatives aimed at fostering innovation and entrepreneurship. For instance, the establishment of high-tech parks and innovation hubs provides startups with access to resources, mentorship, and networking opportunities. Additionally, collaborations between universities, research institutions, and industry players are facilitating the transfer of knowledge and technology, further boosting the development of homegrown robotics solutions. The rise of local startups not only enhances the competitiveness of the Vietnamese robotics market but also contributes to building a skilled workforce and advancing the country's technological capabilities. As the innovation ecosystem continues to evolve, it will play a crucial role in driving the growth and diversification of the robotics market in Vietnam.

Segmental Insights

Component Insights

The hardware segment dominated the Vietnam Robotics Market and is expected to maintain its dominance during the forecast period. This dominance is driven by several factors, including the essential nature of hardware in the construction and functionality of robotic systems. The hardware segment encompasses critical components such as robotic arms, sensors, actuators, controllers, and other physical parts that form the backbone of any robotic solution. The increasing industrialization in Vietnam, particularly in sectors like manufacturing, automotive, electronics, and textiles, has led to a surge in demand for advanced robotic hardware to enhance production efficiency and precision. Additionally, the expansion of the logistics and e-commerce sectors has driven the adoption of automated guided vehicles (AGVs) and warehouse robots, further propelling the hardware market. Investments in infrastructure development and smart manufacturing also contribute significantly to the hardware segment's growth, as businesses seek to modernize their facilities with state-of-the-art robotic systems. Furthermore, the government's supportive policies and incentives for automation and technological innovation encourage companies to invest in high-quality robotic hardware to remain competitive. The continuous advancements in hardware technology, including improvements in sensor accuracy, actuator performance, and the development of more durable and efficient robotic components, are expected to sustain the segment's growth.

As a result, the hardware segment's crucial role in enabling the functionality and application of robots ensures its ongoing prominence in the Vietnam Robotics Market throughout the forecast period.

Type Insights

The articulated robots segment dominated the Vietnam Robotics Market and is expected to maintain its dominance during the forecast period. Articulated robots, characterized by their rotary joints, offer superior versatility and flexibility, making them highly suitable for a wide range of applications across various industries. This segment's dominance is largely driven by the growing demand in the manufacturing sector, particularly in automotive, electronics, and heavy machinery industries, where precision and adaptability are crucial. Articulated robots excel in complex tasks such as welding, assembly, material handling, and painting, providing manufacturers with enhanced productivity and accuracy. Additionally, the increasing automation of production lines to boost efficiency and reduce labor costs further propels the demand for articulated robots. The advancements in robotic technology, such as the integration of artificial intelligence (AI) and machine learning (ML), have significantly enhanced the capabilities of articulated robots, allowing them to perform more complex tasks with greater precision. The ongoing industrialization and the push towards smart manufacturing in Vietnam are also key factors driving the adoption of articulated robots. Government initiatives and incentives aimed at promoting automation and the adoption of Industry 4.0 practices encourage businesses to invest in advanced robotic solutions. The articulated robots segment benefits from the extensive support and availability of global and local manufacturers and suppliers, ensuring that businesses have access to high-quality, reliable robotic systems and components. The presence of established robotics companies and the emergence of local startups focused on developing innovative robotic solutions contribute to the growth and sustained dominance of this segment. As industries continue to modernize and seek more efficient and flexible automation solutions, the articulated robots segment is well-positioned to address these needs, ensuring its continued leadership in the Vietnam Robotics Market. The combination of technological advancements, industrial growth, and supportive government policies creates a favorable environment for the sustained expansion of articulated robots in Vietnam, making this segment the key driver of the market's growth throughout the forecast period.

Regional Insights

Southern Vietnam dominated the Vietnam Robotics Market based on regions, and it is

expected to maintain its dominance during the forecast period. This dominance is attributed to several factors, including the region's robust industrial base, extensive manufacturing infrastructure, and strategic location as a key economic hub in Vietnam. Southern Vietnam, particularly Ho Chi Minh City and its surrounding provinces, hosts a significant concentration of manufacturing facilities across various industries, including automotive, electronics, textiles, and consumer goods. These industries have been at the forefront of adopting robotic automation to enhance productivity, efficiency, and quality in production processes. Moreover, Southern Vietnam benefits from a well-developed ecosystem supporting the robotics industry, including access to skilled labor, research and development institutions, and a network of suppliers and service providers specializing in robotics technology. Additionally, the region's proximity to major seaports and international airports facilitates the efficient movement of goods and components, further supporting the adoption of robotics in logistics and supply chain operations. The Southern region's favorable business environment, characterized by supportive government policies, incentives for investment, and a thriving entrepreneurial ecosystem, creates an ideal landscape for the continued growth of the robotics market. Furthermore, ongoing initiatives aimed at promoting innovation, technology transfer, and industry-academia collaboration contribute to the region's dominance in robotics adoption. As Southern Vietnam continues to attract investments and drive economic growth, fueled by industrialization and urbanization trends, it is expected to maintain its leading position in the Vietnam Robotics Market, serving as a key driver of the country's automation revolution.

Key Market Players

FANUC Corporation

Yaskawa Electric Corporation

ABB Ltd.

KUKA AG

Mitsubishi Electric Corporation

Kawasaki Heavy Industries, Ltd.

Denso Corporation

Nachi-Fujikoshi Corporation

Omron Corporation

Techman Robot Inc.

Report Scope:

In this report, the Vietnam Robotics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Vietnam Robotics Market, By Component:

Hardware

Software

Vietnam Robotics Market, By Type:

Articulated

Cartesian

SCARA

Cylindrical

Others

Vietnam Robotics Market, By End User:

Healthcare

Media & Entertainment

Aerospace & Defence

Logistics

Automotive

Others

Vietnam Robotics Market, By Region:

Southern Vietnam

Northern Vietnam

Central Vietnam

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Vietnam Robotics Market.

Available Customizations:

Vietnam Robotics Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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