

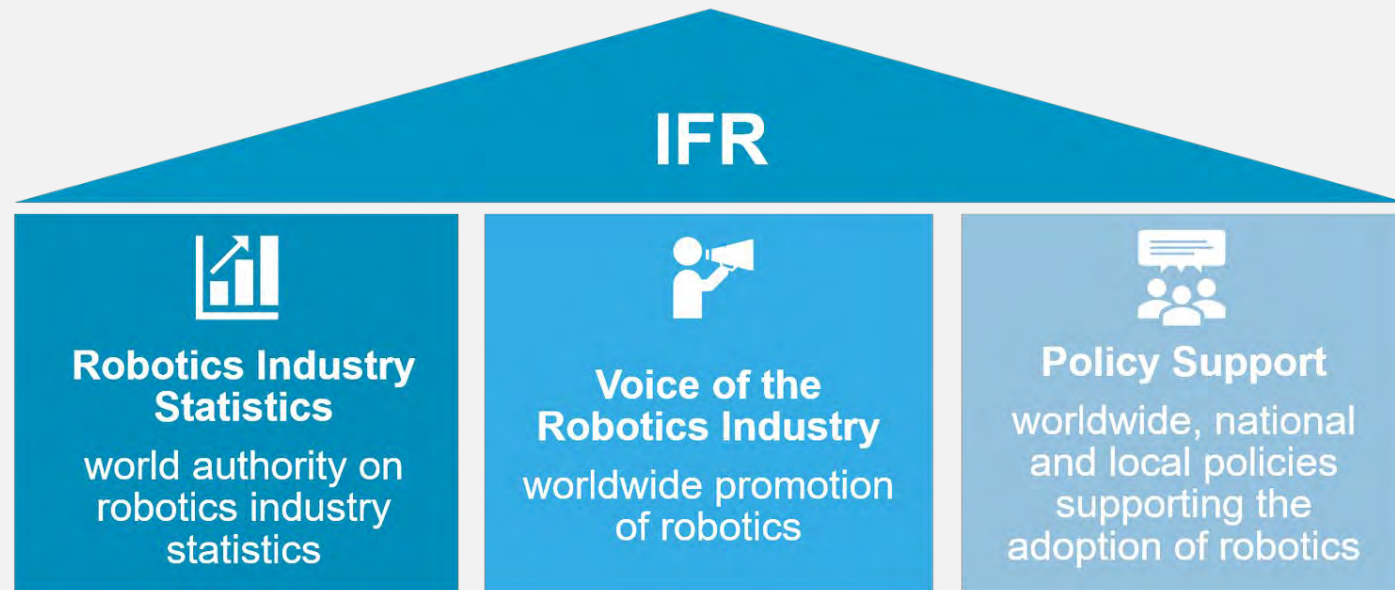
IFR Robotics Executive Roundtable  
on 24 June 2026

# What's Next in Automation: Market Forces, Technology, and Leadership Perspectives



# International Federation of Robotics

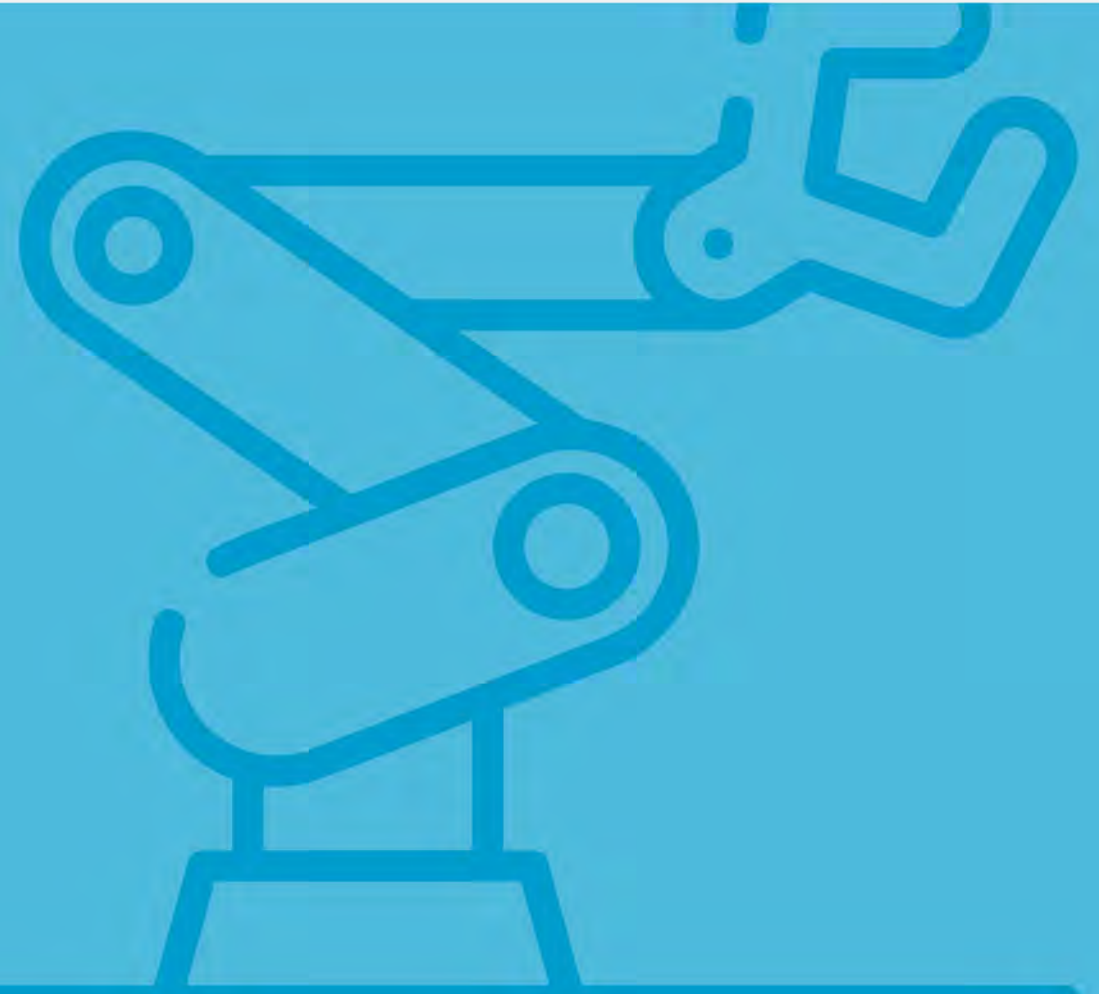
- **Global non-profit organization** – active for the robotics sector since 1987
- IFR represent **more than 3,000 organizations** from **30 countries**
  - Robot manufacturers, national robotics associations, universities, start-ups worldwide
- Annual global **robotics turnover \$50 billion** (robot systems including software & peripherals)



# The Status of the Global Robotics Market

Speaker:

**Jane Heffner**  
IFR President



# IFR statistics 2025: preliminary results and World Robotics



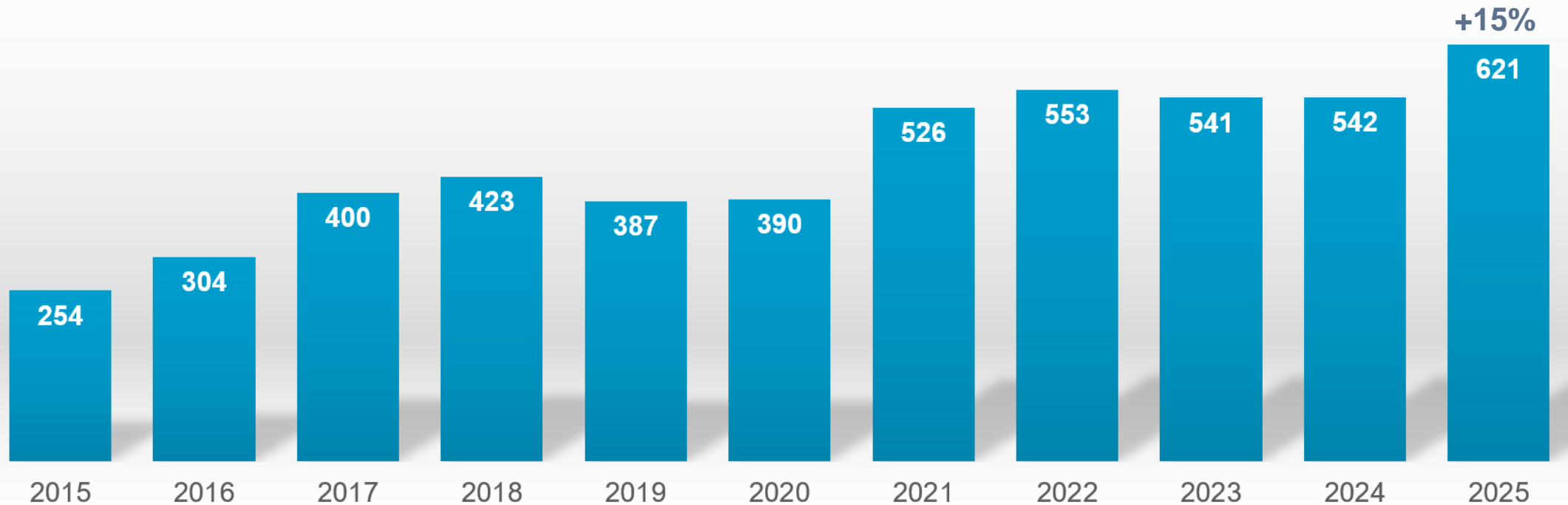
- Numbers presented here are **preliminary** as of April 2026
- Final results most likely are subject to changes
- They will be published in **World Robotics 2026** Available 24 September 2026

# Preliminary global installations 2025: 621,000 units (+15%)



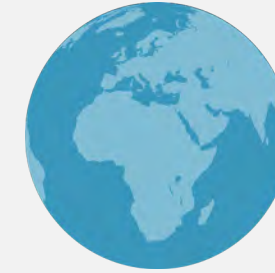
## Annual installations of industrial robots - World

1,000 units



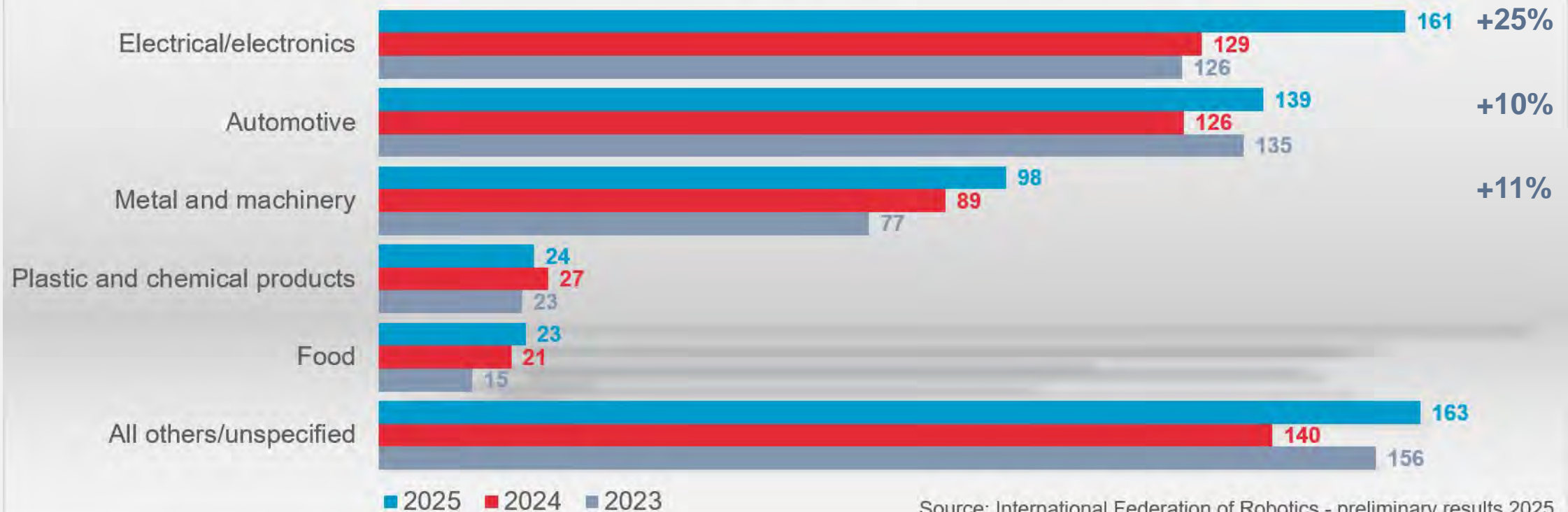
Source: International Federation of Robotics - preliminary results 2025

# Electronics and automotive head-to-head



## Annual installations of industrial robots by customer industry - World

1,000 units

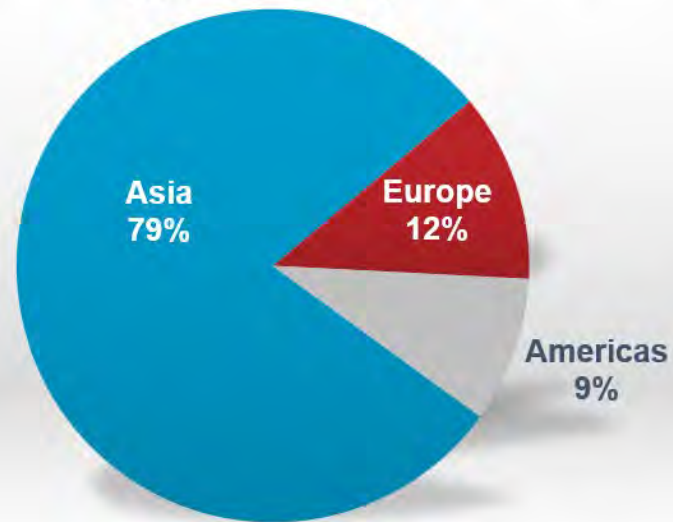


Source: International Federation of Robotics - preliminary results 2025

# Further strong growth in Asia - Divide between regions is widening

## Regional shares in annual installations

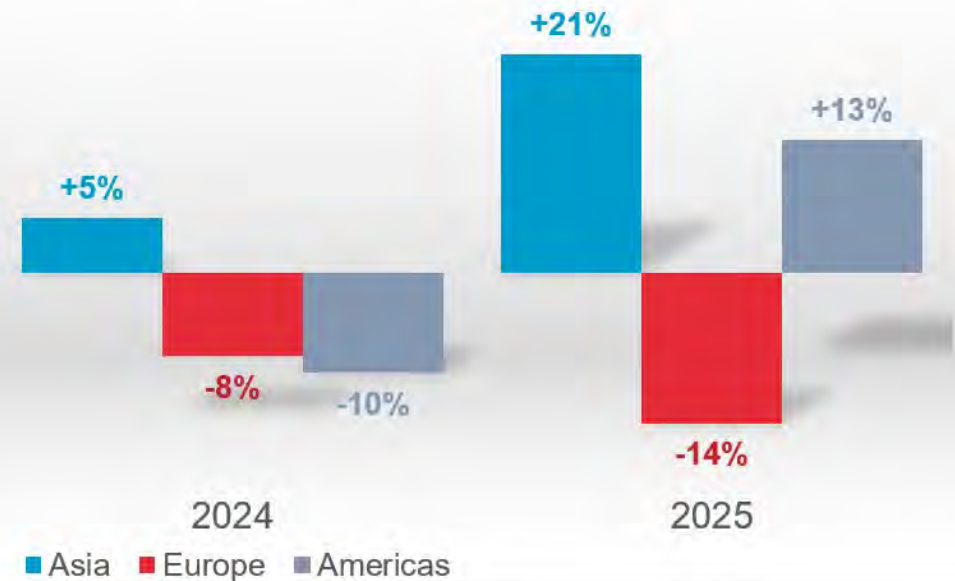
Shares in annual installations of industrial robots 2025  
(% of grand total)



Source: International Federation of Robotics - preliminary results 2025

## Regional growth in annual installations

Annual percentage growth of installations of industrial robots

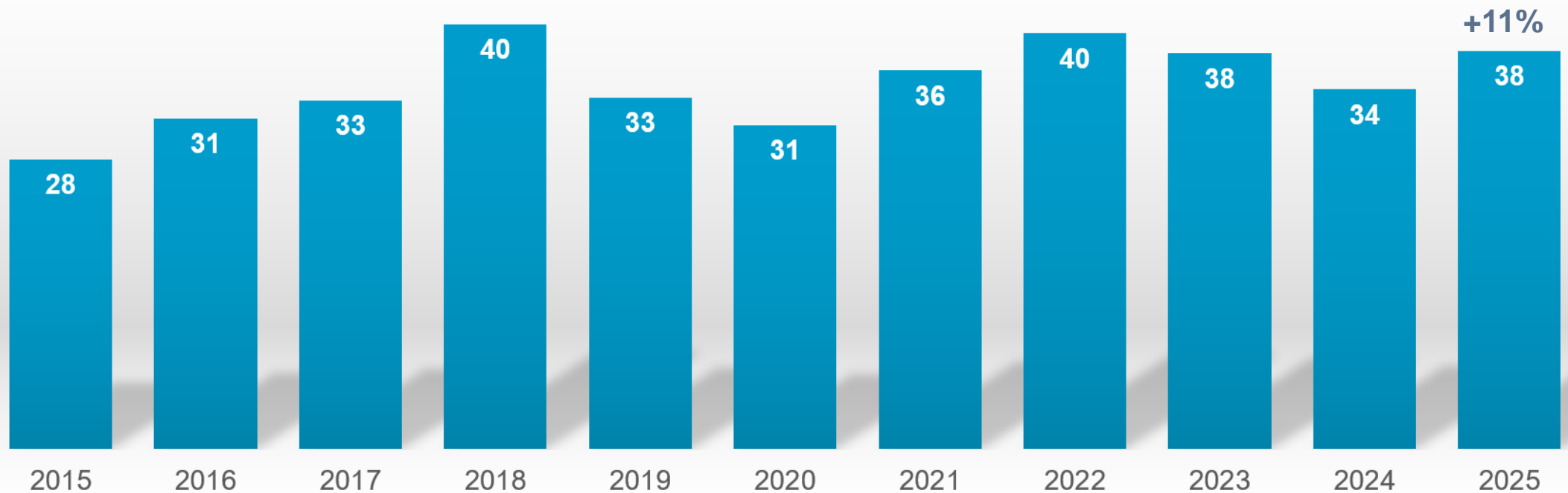


# United States: back on growth track



## Annual installations of industrial robots - United States

1,000 units

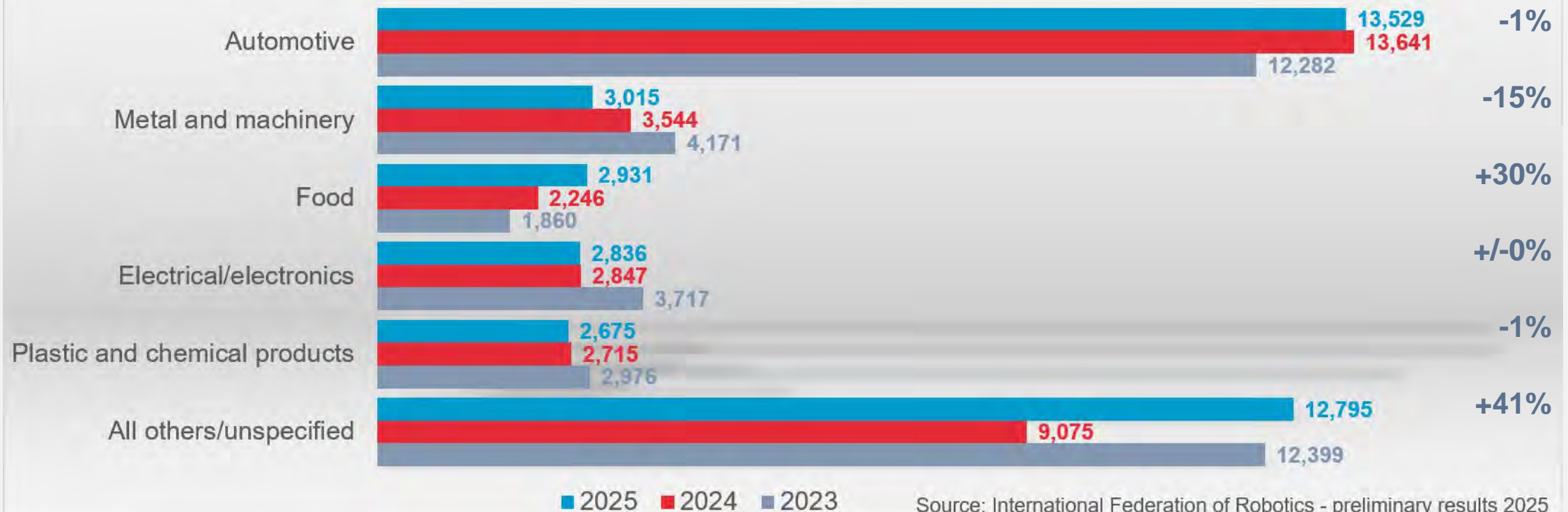


Source: International Federation of Robotics - preliminary results 2025

# Automotive industry is the main pillar of US robot demand



Annual installations of industrial robots by customer industry - United States  
units

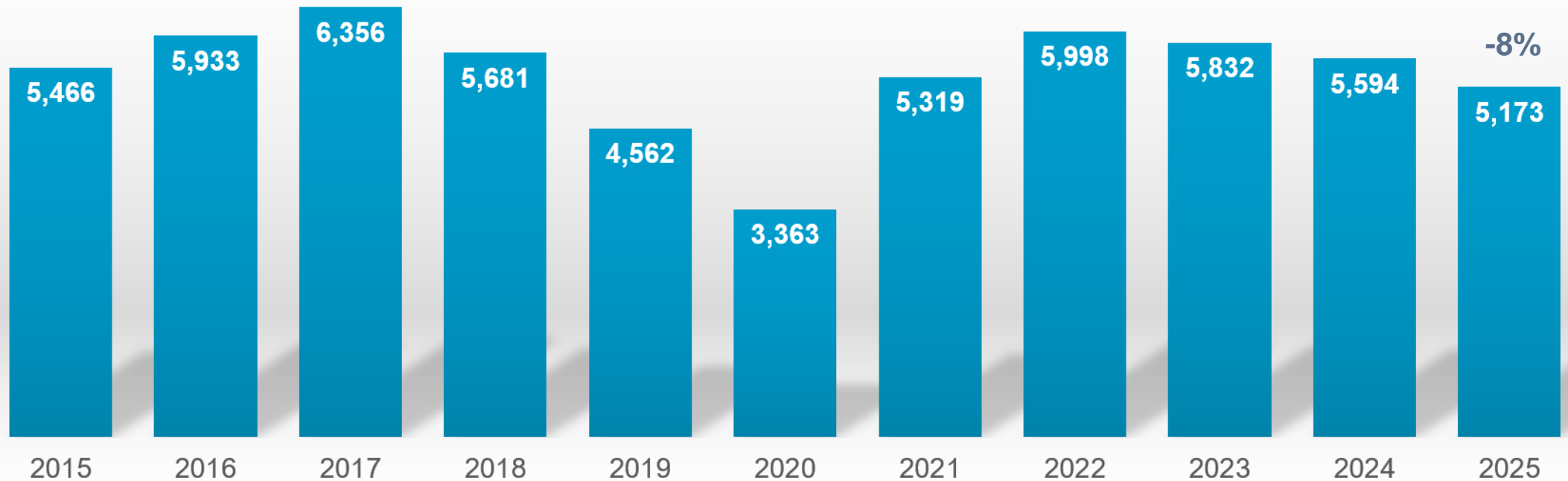


# Mexico: Continued contraction



## Annual installations of industrial robots - Mexico

units

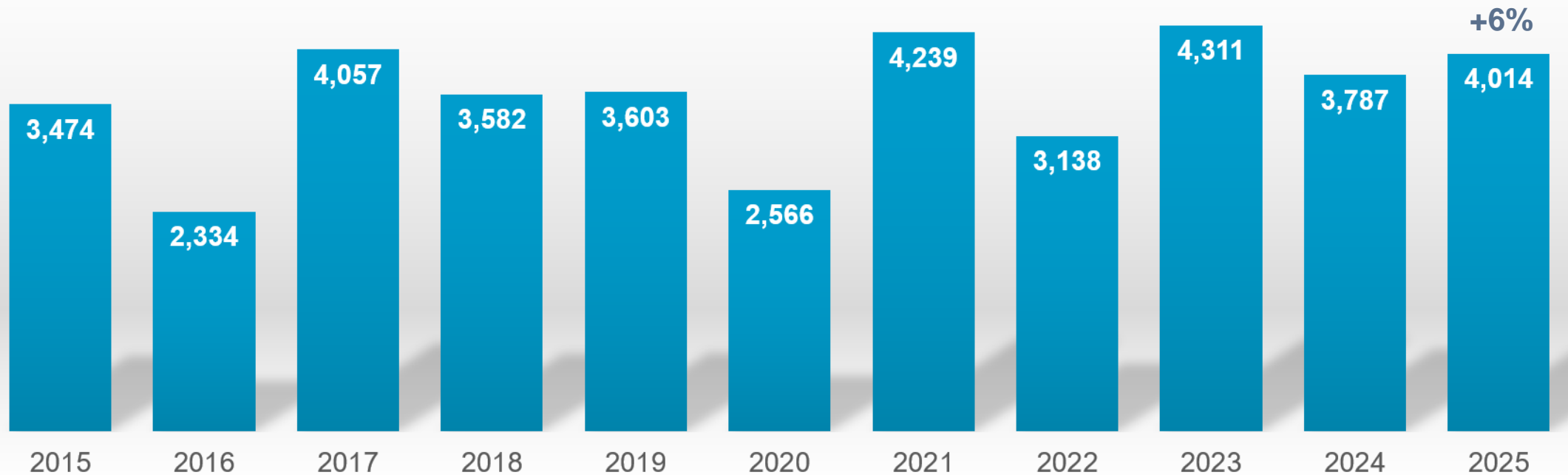


Source: International Federation of Robotics - preliminary results 2025

# Canada: Moderate growth driven by food and electronics

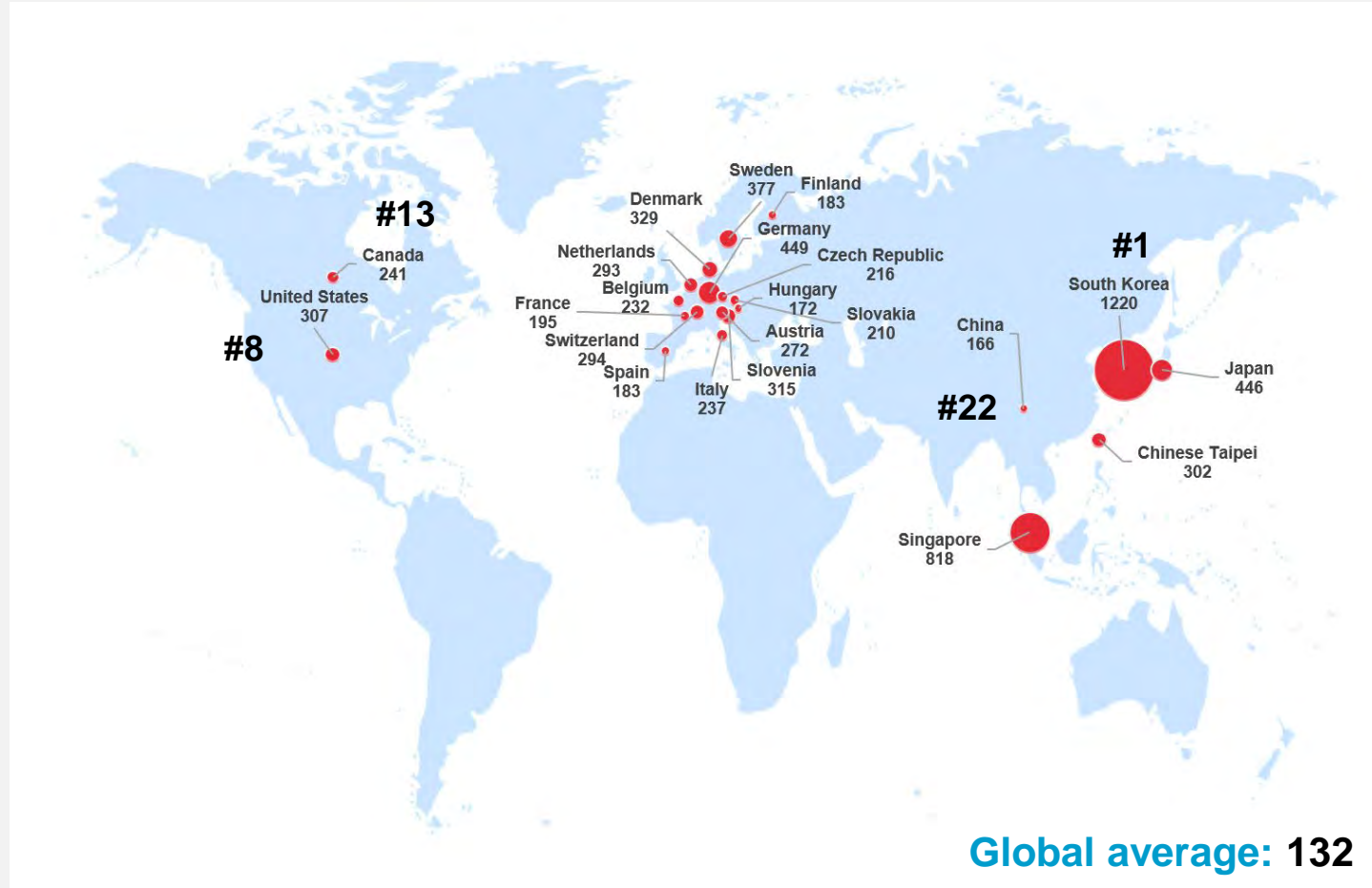


Annual installations of industrial robots - Canada  
units



Source: International Federation of Robotics - preliminary results 2025

# Global comparison: robot densities



## Robot density:

- No. of industrial robots in operation per 10.000 manufacturing employees

## Regional average (CAGR 2019-24):

- **Americas: 131 (+6%)**
- **Asia: 131 (+12%)**
- **Europe: 148 (+7%)**
- **US: 307 (+6%)**
- **Canada: 241 (+7%)**
- **Mexico: 62 (+7%)**

# Outlook for 2026 is positive for North America

- Strong turnover in **North America** and **Asia** in Q1/2026
- Business in **Europe** remains challenging
- Strongly growing **sectors**:
  - Chemicals and pharmaceuticals
  - Electrical/electronics
- **General industry** demand outpaces **automotive**
- **Reshoring** initiatives and **workforce shortages** drive automation investments
- But: Macroeconomic **uncertainty** continues to affect investment visibility

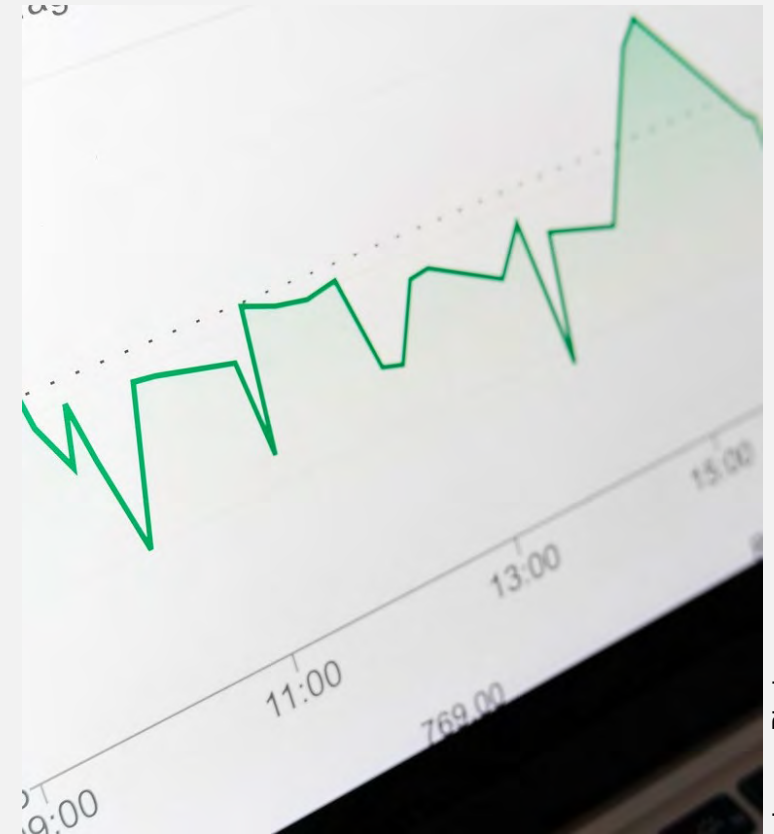


Image: Pixabay

Source:

\* IFR Quarterly Survey and A3

# Top 5 trends driving the robotics industry in 2026 and beyond

1

**ROBOTS AS ALLIES IN  
TACKLING LABOR GAPS**



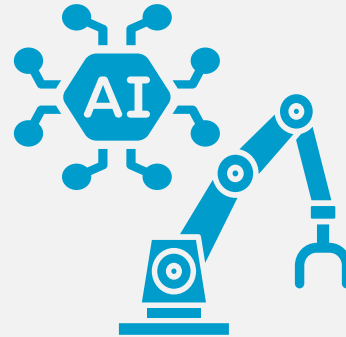
2

**ROBOTS GAIN  
VERSATILITY AS IT  
MEETS OT**



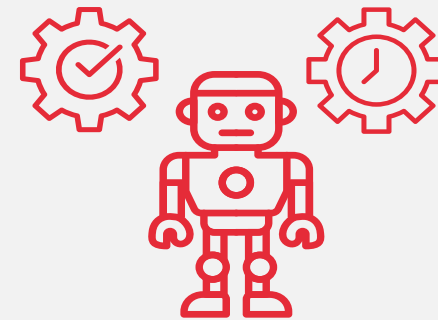
3

**AI & AUTONOMY IN  
ROBOTICS**



4

**HUMANOIDS TO PROVE  
RELIABILITY AND  
EFFICIENCY**



5

**SAFETY AND  
SECURITY IN  
ROBOTICS**



# Robots as allies in tackling labor gaps due to demographic shift



Source: Canva

- **Demographic shift** leads to **declining working-age population**
- Population ageing could lead to a dramatic **slowdown of economic growth**
- Improvement in **productivity gains** needed
- **Employability** of workers throughout their working lives
  - **Skilling and upskilling programs** help workers adapt in an automation-driven economy
  - **Employee involvement** key to acceptance in industry and services

# Convergence of IT and OT increases robots' versatility



Source: Canva

- **Convergence** of **IT** and **OT** is the foundational element of the **digital enterprise** (Industry 4.0)
  - allows for **seamless data flow** between the digital and physical worlds
- **Connected systems** allow to scale, adapt, and integrate over time
- Robots as **Cyber-physical systems**
  - **System design** and **interoperability** (OPC UA) are crucial
- Improving the **versatility and capabilities** of robots

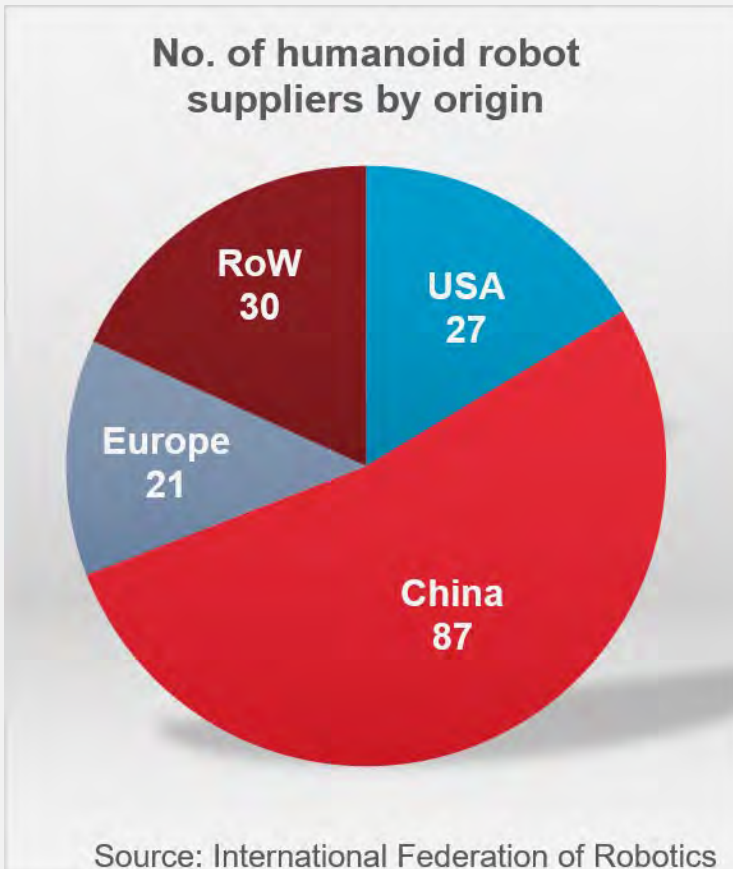
# AI-enabled robots becoming increasingly autonomous



Source: Robotphoenix

- Artificial Intelligence not new to robotics
  - **Analytical AI:** Processes large datasets, recognizes patterns, and enables predictive actions.
- AI becomes more **capable and accessible**
  - **Generative AI:** autonomously generate intent-based actions, adapt to new environments
- Future: **enabling non-experts** to deploy and operate robotic systems
  - **Agentic AI: Autonomy & goal-oriented**
- Reduce the need for specialized programming skills
- Allowing broader participation in automation.

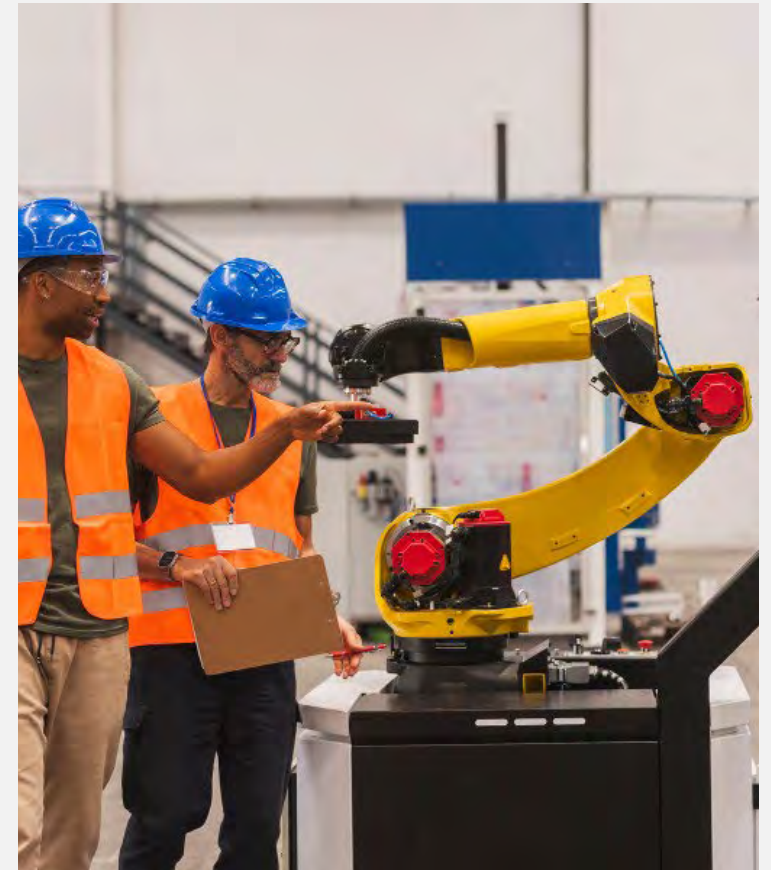
# Humanoids at the center of attention - yet to prove reliability and efficiency



- **Large investments** going into humanoid companies
- Humanoid robotics is **rapidly expanding**
- **Huge expectations** towards performance and applicability
- Mostly **trial applications** and **prototypes** so far
- **Automotive industry** as pioneer customer, warehousing and manufacturing deployments following
- **Reliability, efficiency**, and compliance with high **industrial standards** are critical for real-world adoption
- **Huge impact** on (traditional) robotics expected

# Safety and Security in Robotics

- **Huge opportunities** of connected, AI-enabled and humanoids robots
- Rising risks:
  - (Cyber) **security**,
  - **data privacy** and protection
  - Transparency, accountability, AI model integrity, vulnerability
  - **Physical safety** & Human interaction risks
- Demand for **governance** and assignment of **liability**
- **Safety validation** and testing more complex and essential
- Definition and compliance with **ISO safety standards**



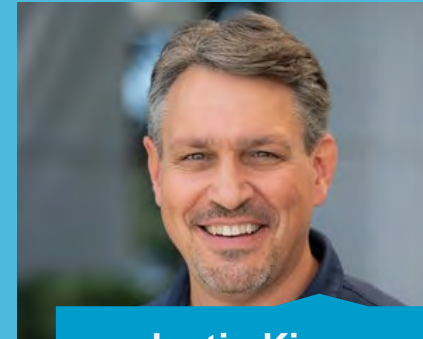
Source: Canva

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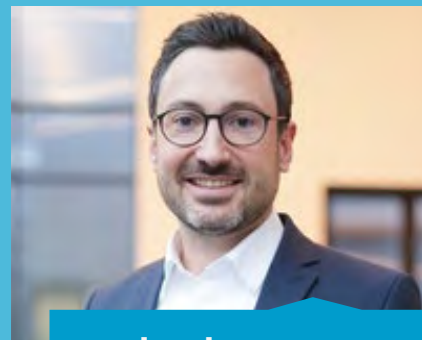
**Justin Brown**  
Teradyne



**Justin King**  
OMRON Robotics



**Robert Little**  
Robert Little Robotics  
Advisory



**Jan Louwen**  
Stäubli



**Mikell Taylor**  
General Motors



**Robert Huschka**  
A3