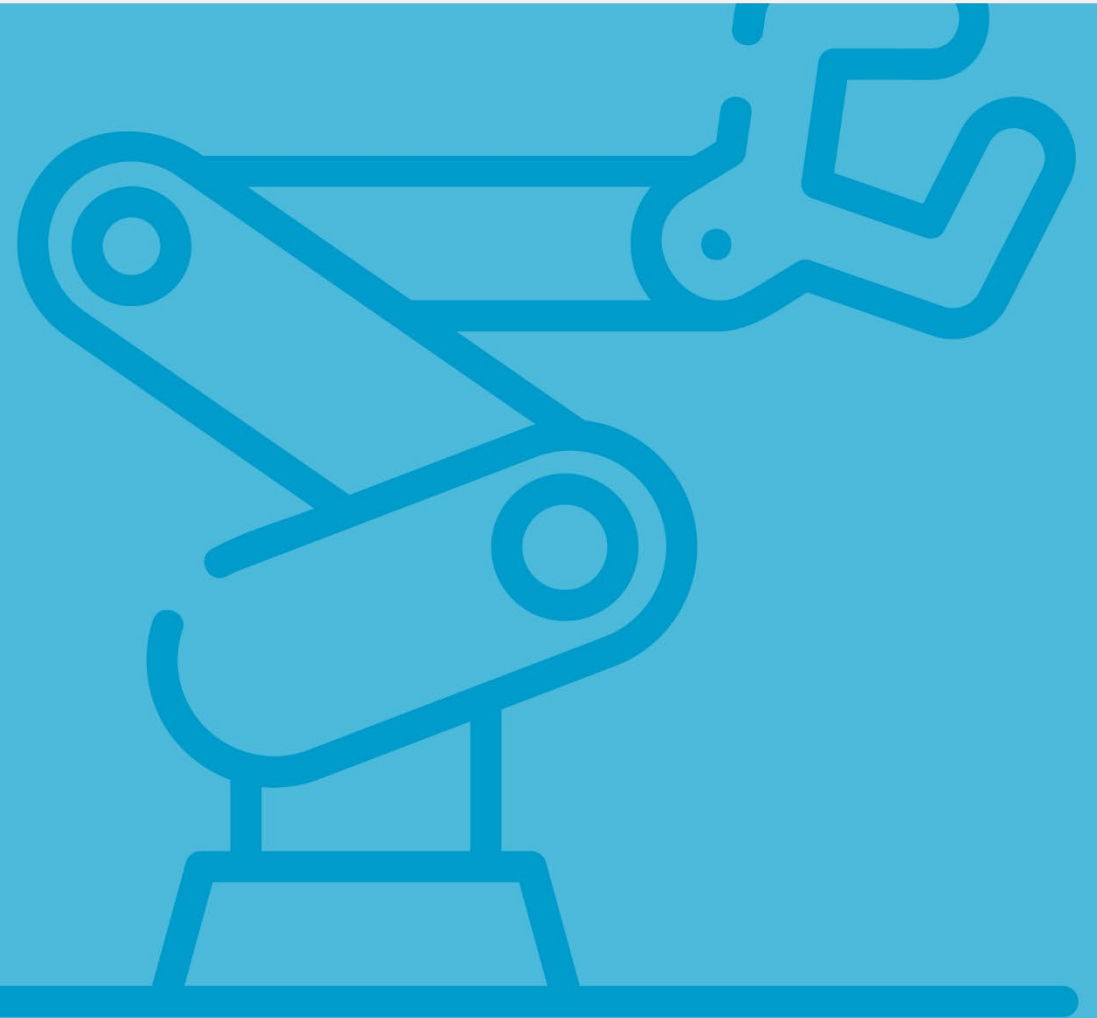


Welcome to the Press conference on

World Robotics 2026



The Speakers



Jane Heffner
IFR President

Global VP of Channel
Communication,
Teradyne Robotics



Dr. Christopher Müller
Director Statistical Dpt.

International Federation
of Robotics



Dr. Werner Kraus
Chair IFR Service Robot
Committee

Head of Automation and
Robotics Division,
Fraunhofer IPA

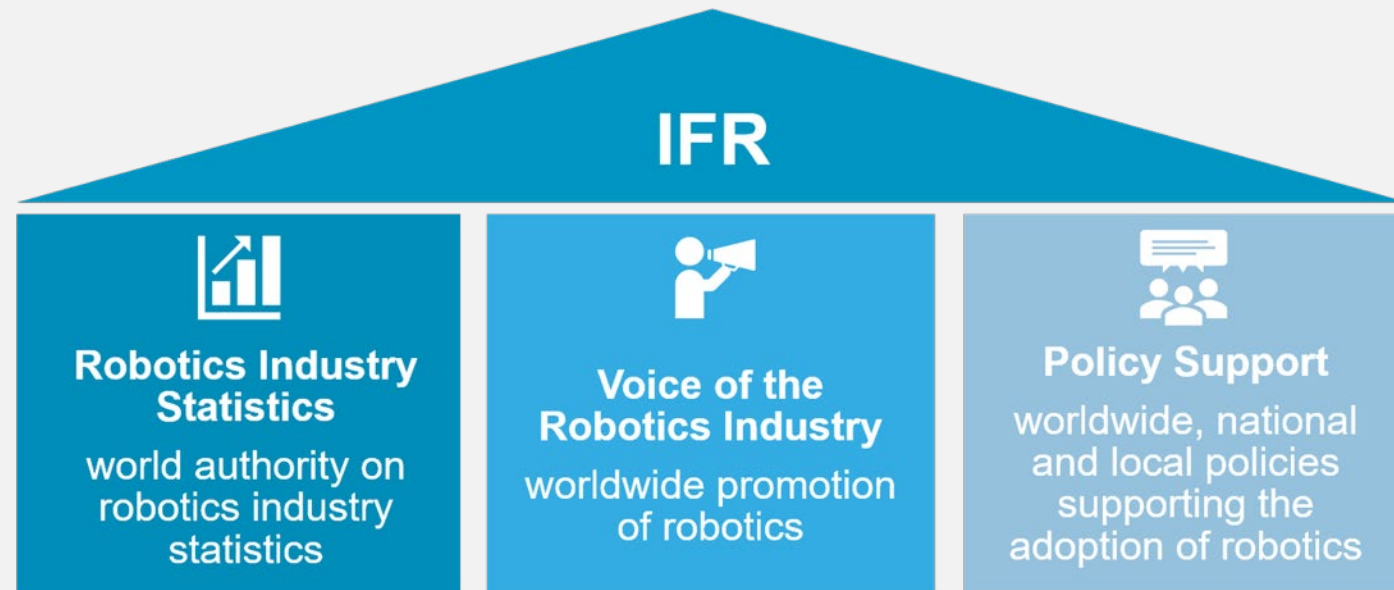


Dr. Susanne Bieller
General Secretary

International Federation
of Robotics

International Federation of Robotics

- **Global non-profit organization** – active for the robotics sector since 1987
- IFR represents **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)



Our members

NATIONAL ASSOCIATIONS



INDUSTRIAL ROBOT MANUFACTURERS



SERVICE ROBOT MANUFACTURERS



COMPONENT SUPPLIERS & INTEGRATORS



R&D INSTITUTES



What Counts as a Robot?



Image: Yaskawa

- Robots are **physical machines** that can **perform tasks** with some autonomy.
- **Included in World Robotics:**
 - **Industrial** robots in factories
 - Professional and consumer **service** robots, **Mobile** robots
 - **Medical** robots
- **Not included:**
 - ⊗ Software bots and RPA
 - ⊗ Remote-controlled devices (drones, underwater vehicles)
 - ⊗ Autonomous cars and busses
 - ⊗ Consumer electronics such as smart appliances

Two reports

Industrial robots



Source: ESTUN

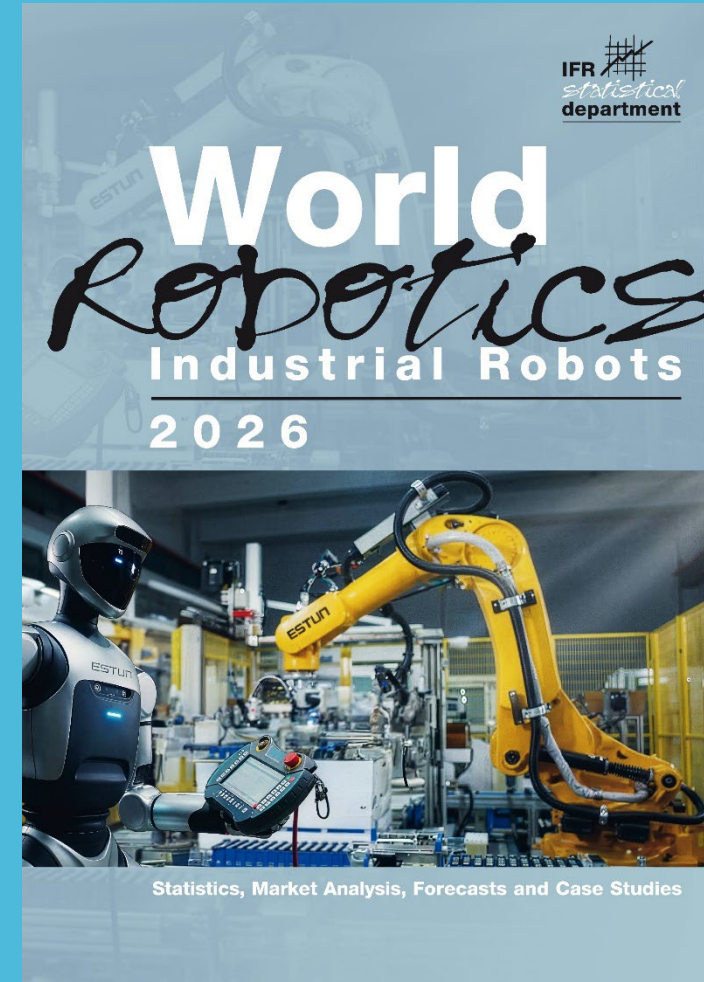
Service, mobile and medical robots



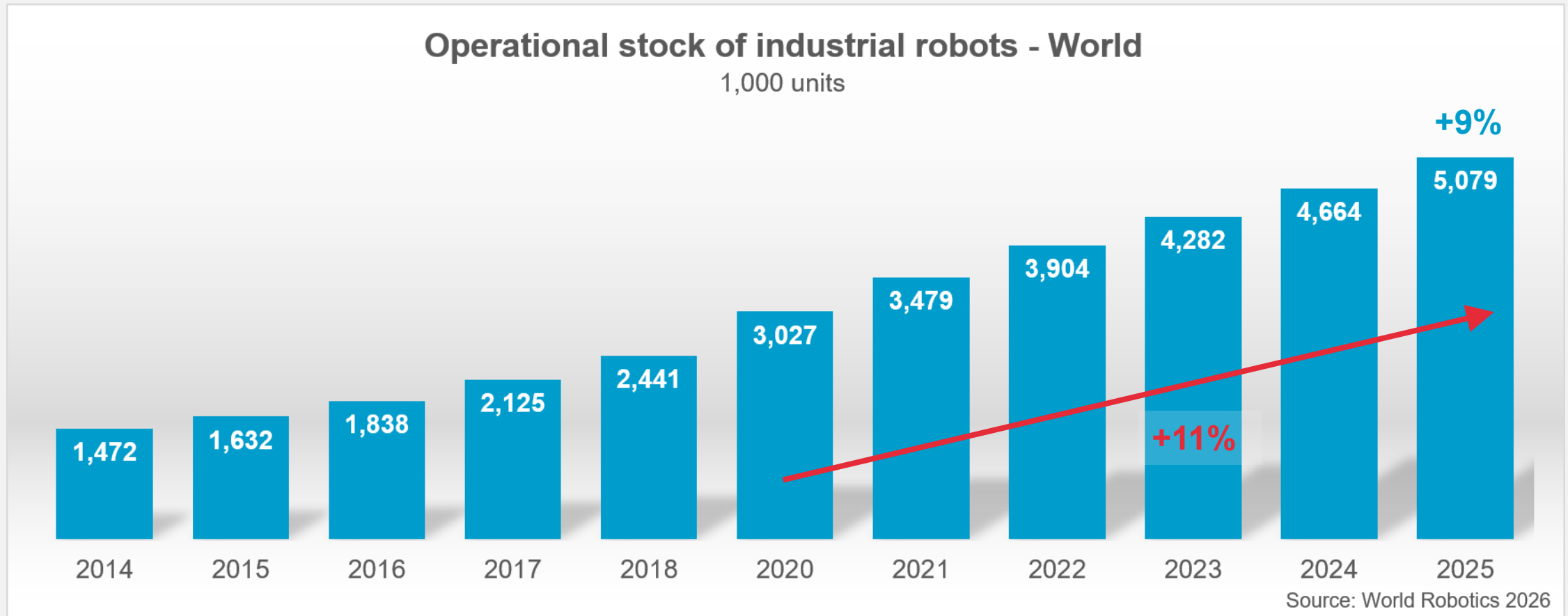
Source: Innok

Key insights of **World Robotics 2026 – Industrial Robots**

Market Shifts and Growth Drivers



Global Robot Base Reaches New Milestone of Five Million Robots

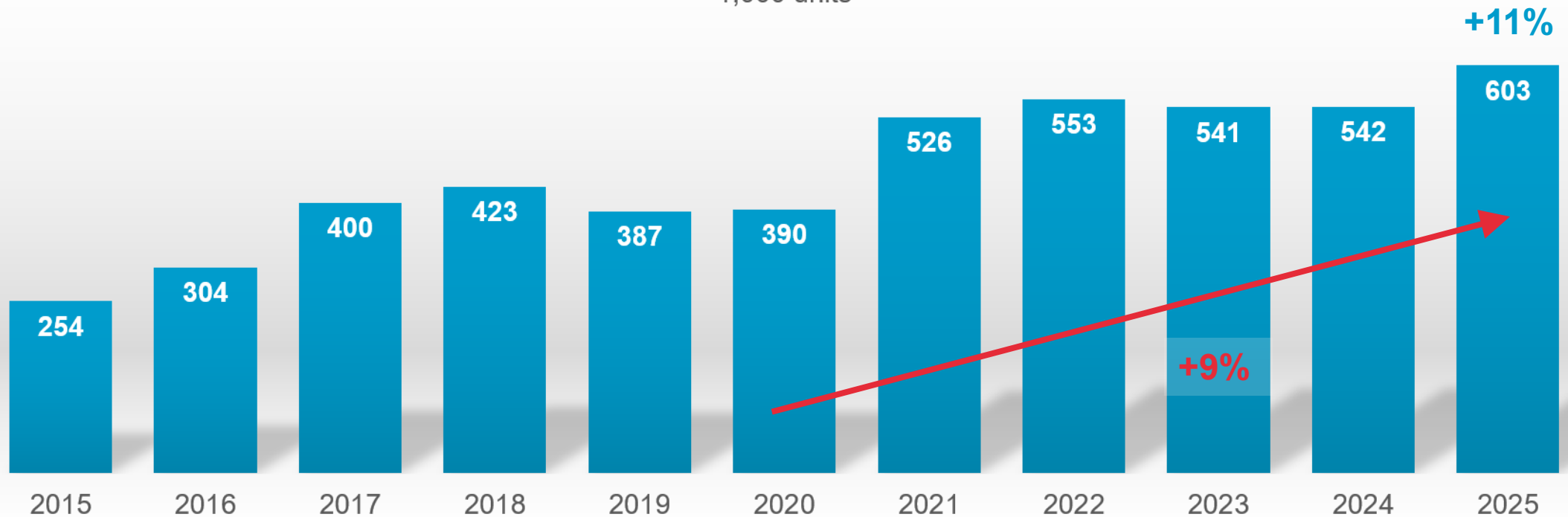


Global robot demand: from plateau to new record



Annual installations of industrial robots - World

1,000 units

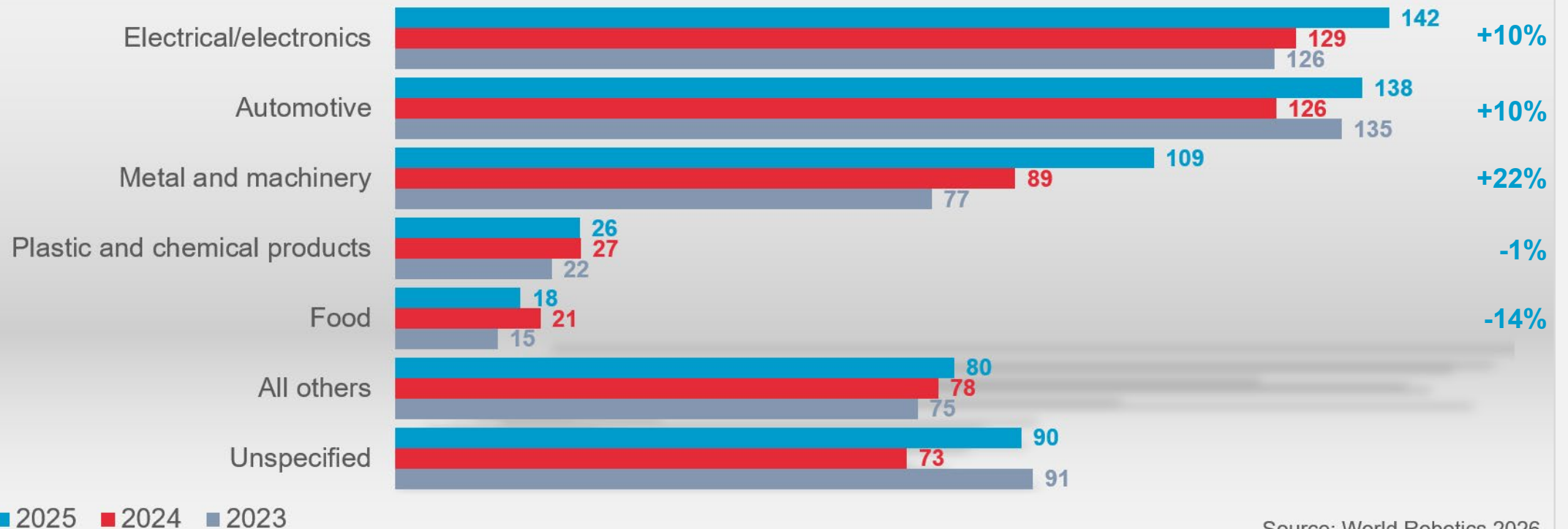


Source: World Robotics 2026

Three main customers increase robot installations



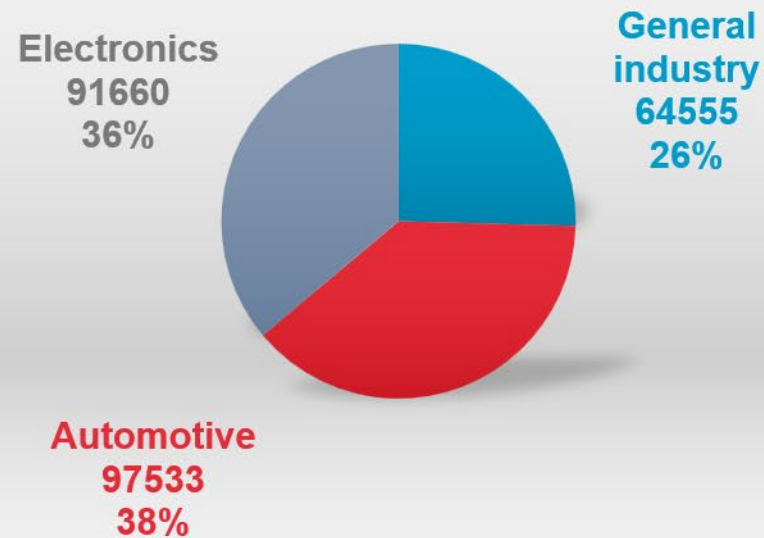
Annual installations of industrial robots by customer industry - World
1,000 units



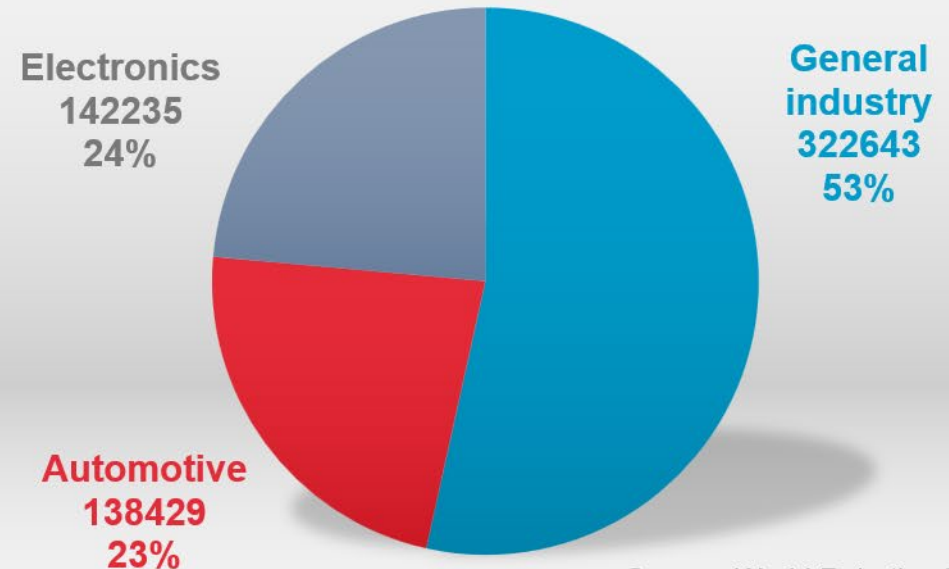
Source: World Robotics 2026

The center of gravity of robotics has shifted from automotive to general industry

Installations of industrial robots by industry - World - 2015
units and percentage share



Installations of industrial robots by industry - World - 2025
units and percentage share



Source: World Robotics 2026

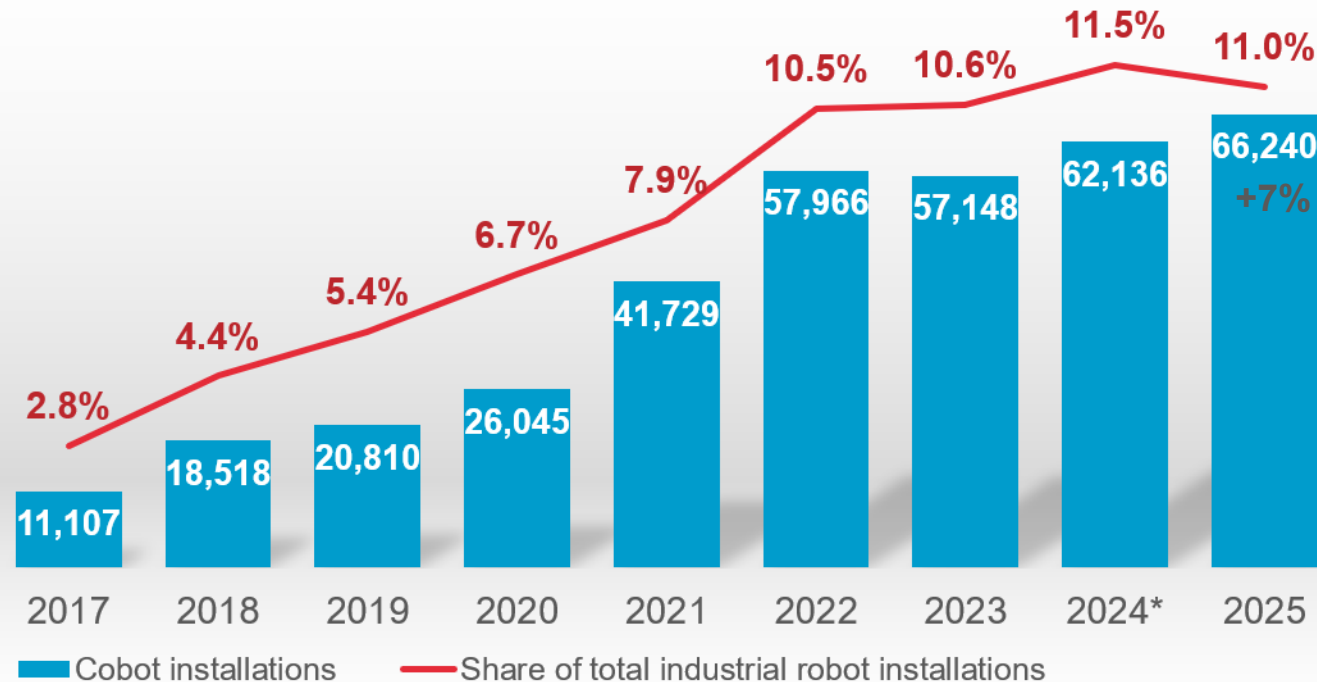
Demand in General Industries has quintupled over a decade

Collaborative robot installations establish at 11% of industrial robots



IFR
International
Federation of
Robotics

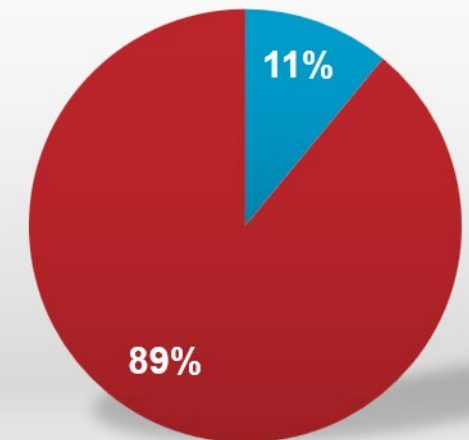
Annual installations of collaborative industrial robots



*revised

Source: International Federation of Robotics

Shares of cobots vs. total industrial robots - 2025



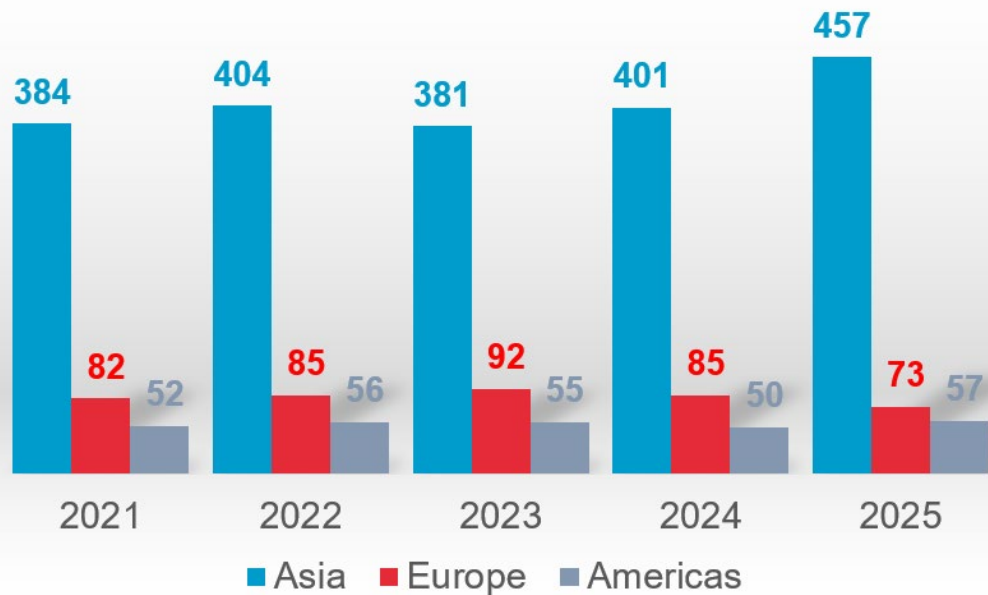
■ Cobot installations
■ Industrial robots without cobots

*revised

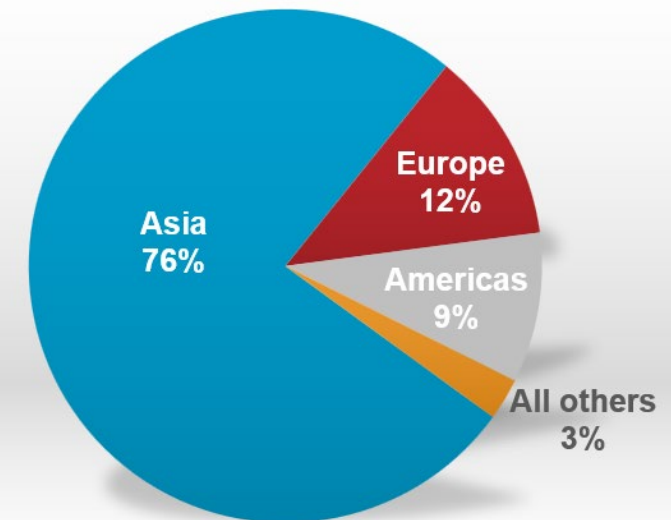
Asia expands its lead over Europe and Americas

Annual installations per region

Annual installations of industrial robots
('000 of units)

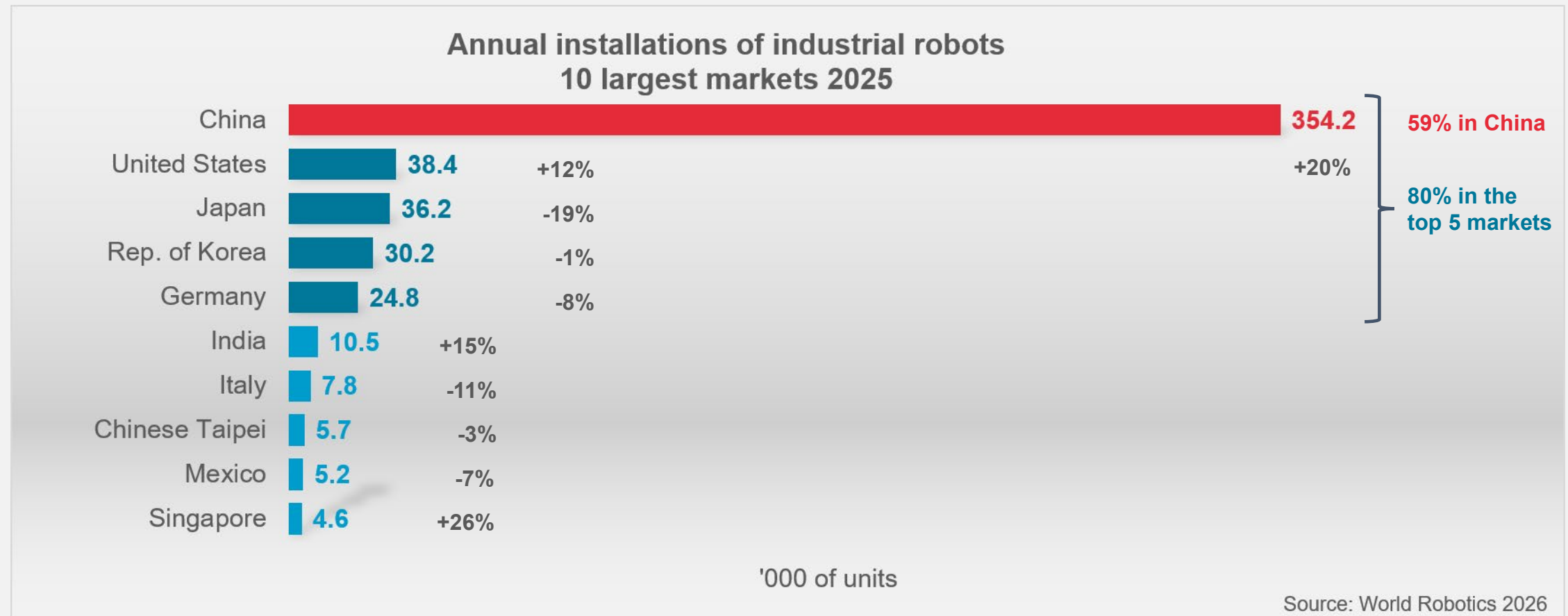


Shares in annual installations of industrial robots - 2025
(% of grand total)

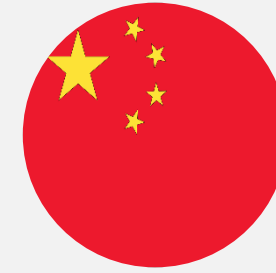


Source: International Federation of Robotics

Top 10 markets - new installations

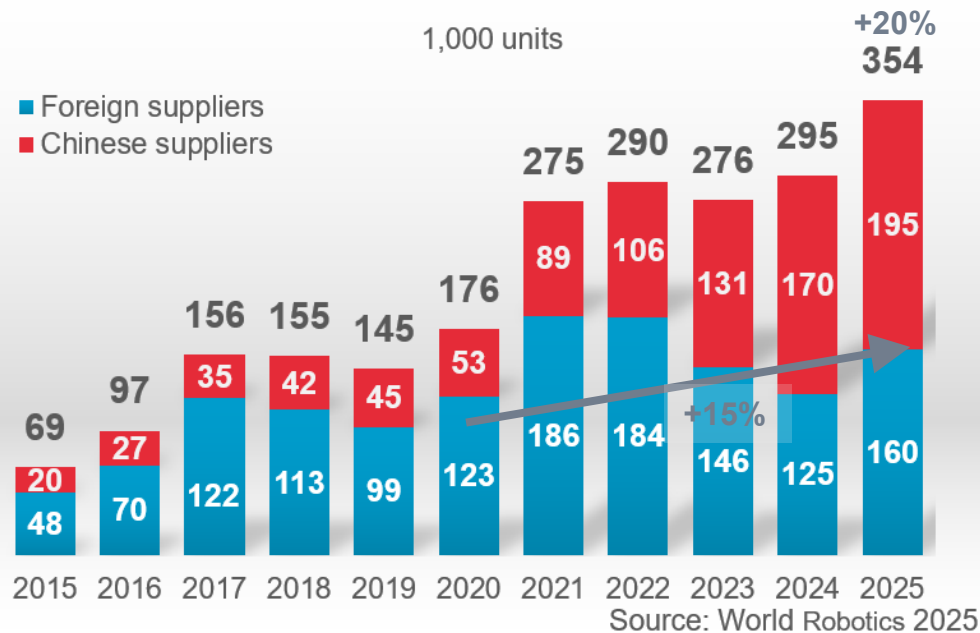


China drives global growth



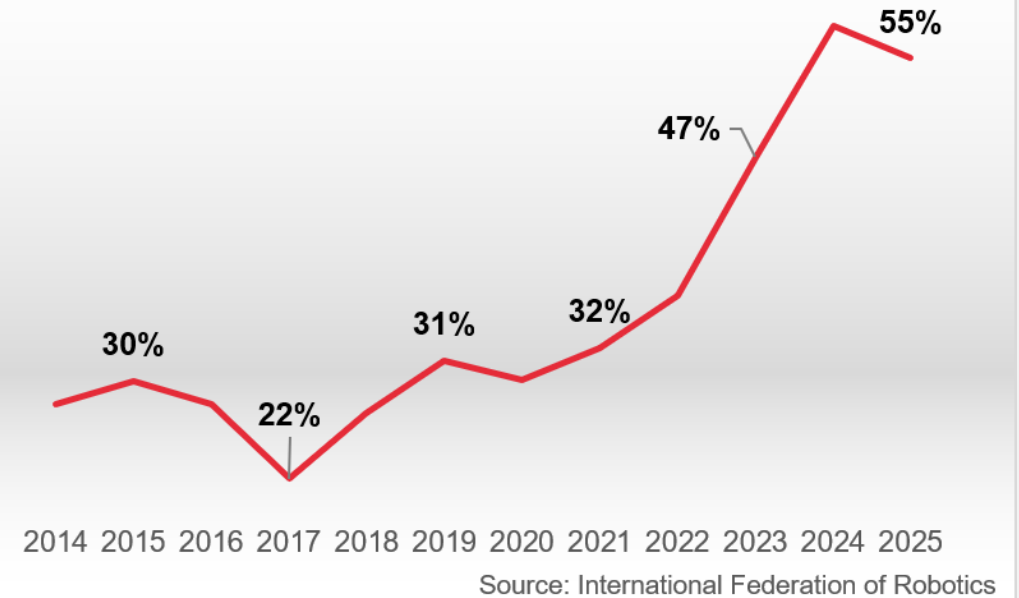
Share of Chinese suppliers at 55%

Annual installations of industrial robots - China

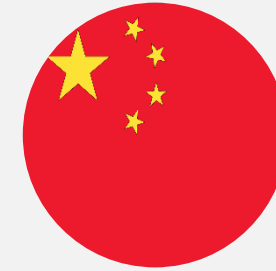


Increasing market shares of domestic suppliers

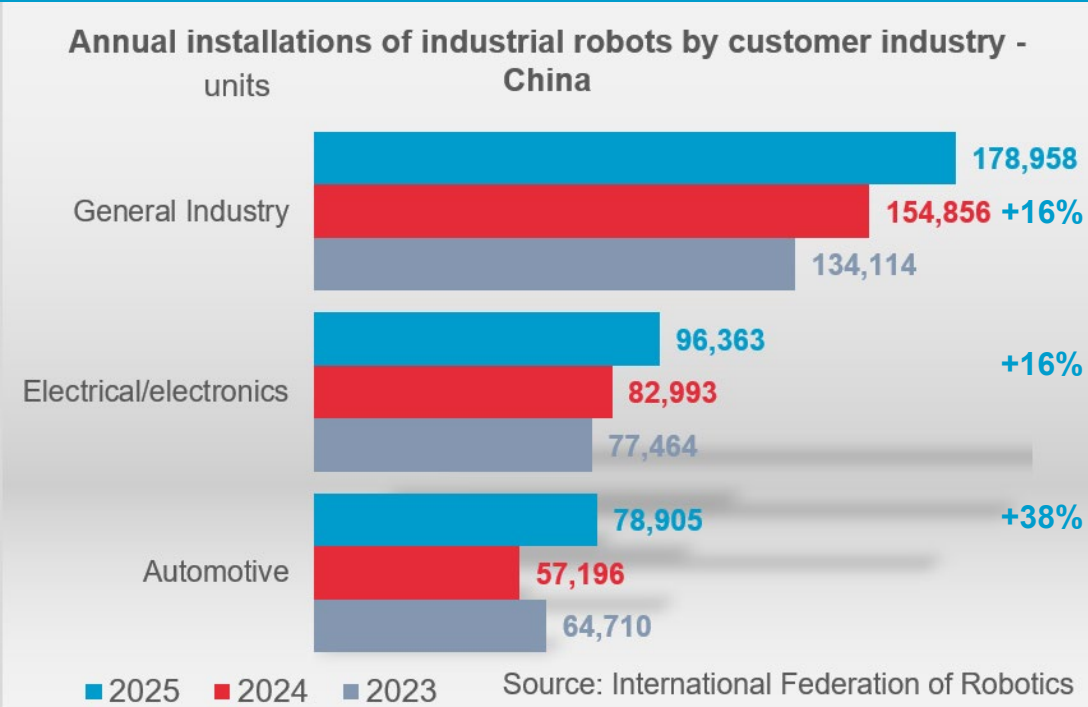
Shares of Chinese Domestic Suppliers



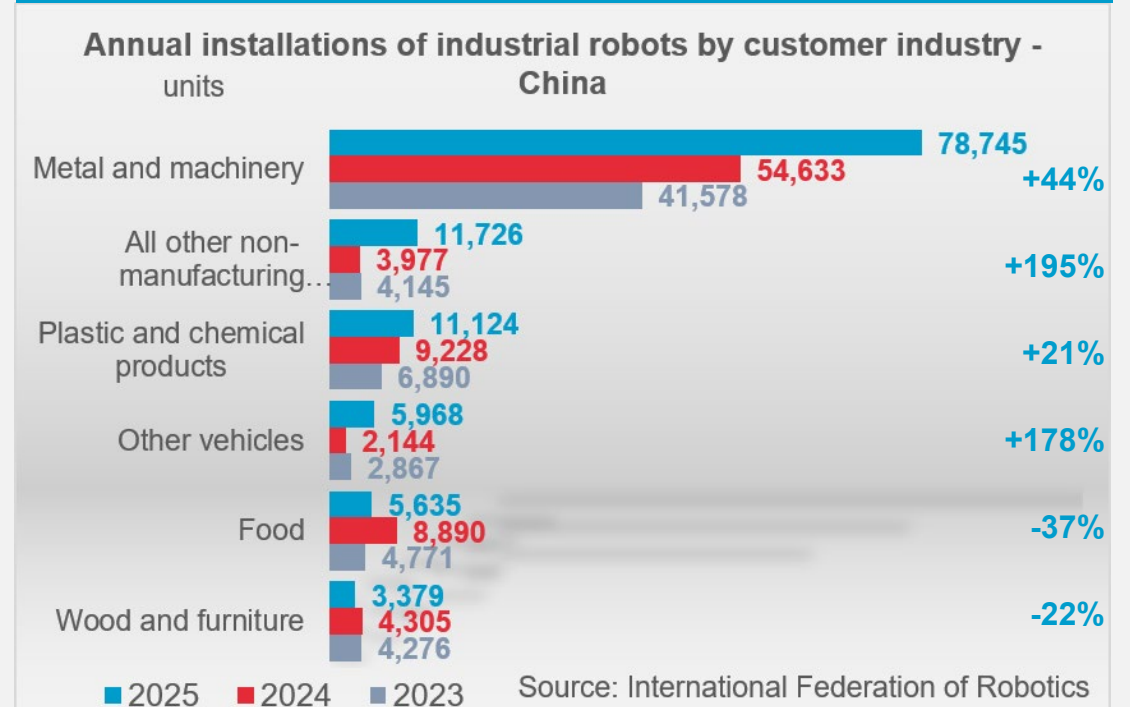
China: Strong growth across industries



Main customer industries



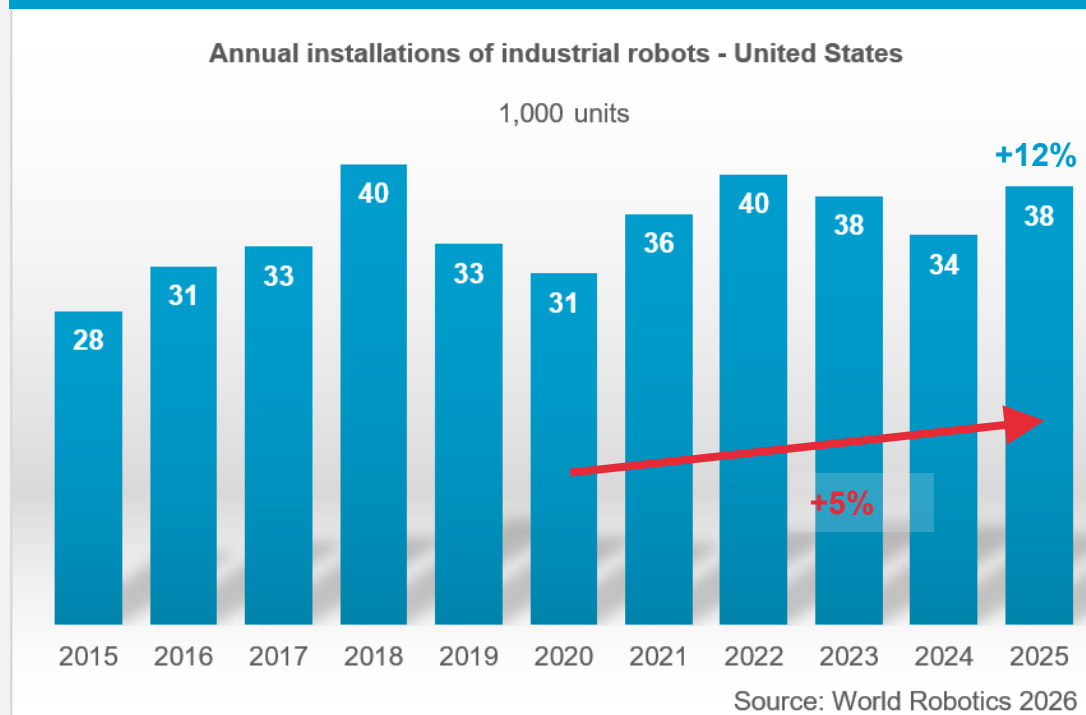
Focus on general industries – new markets



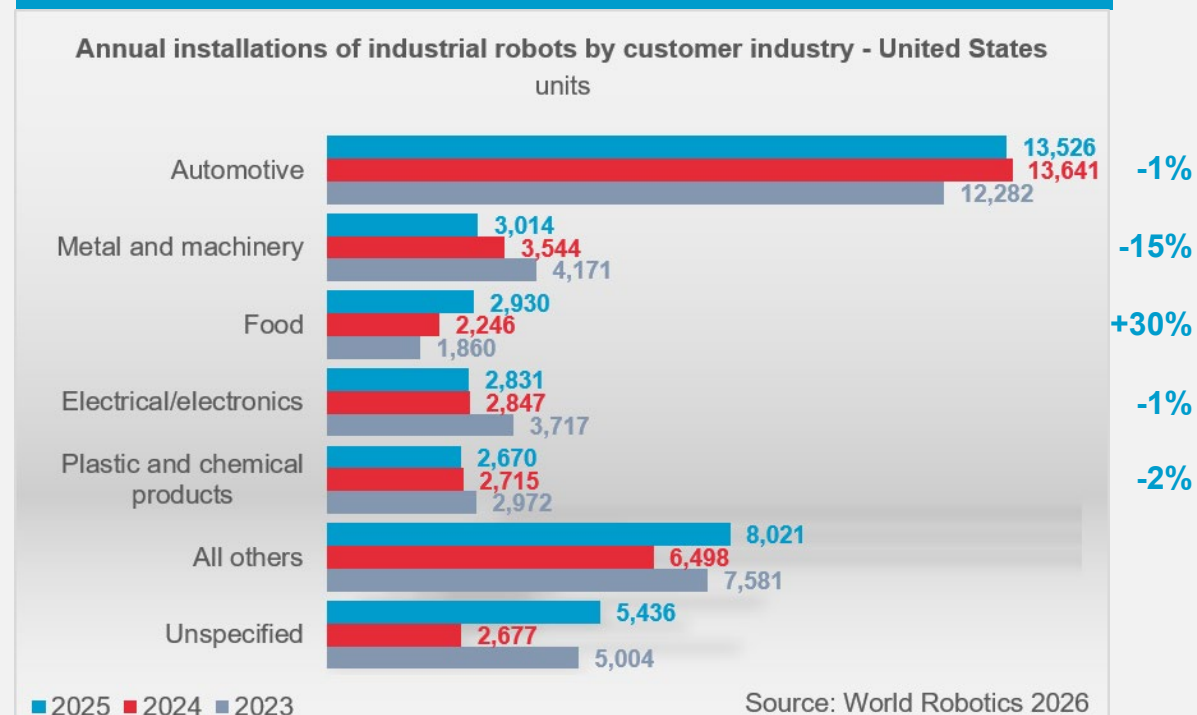
US: Reshoring policy drives robot demand



United States back on growth track



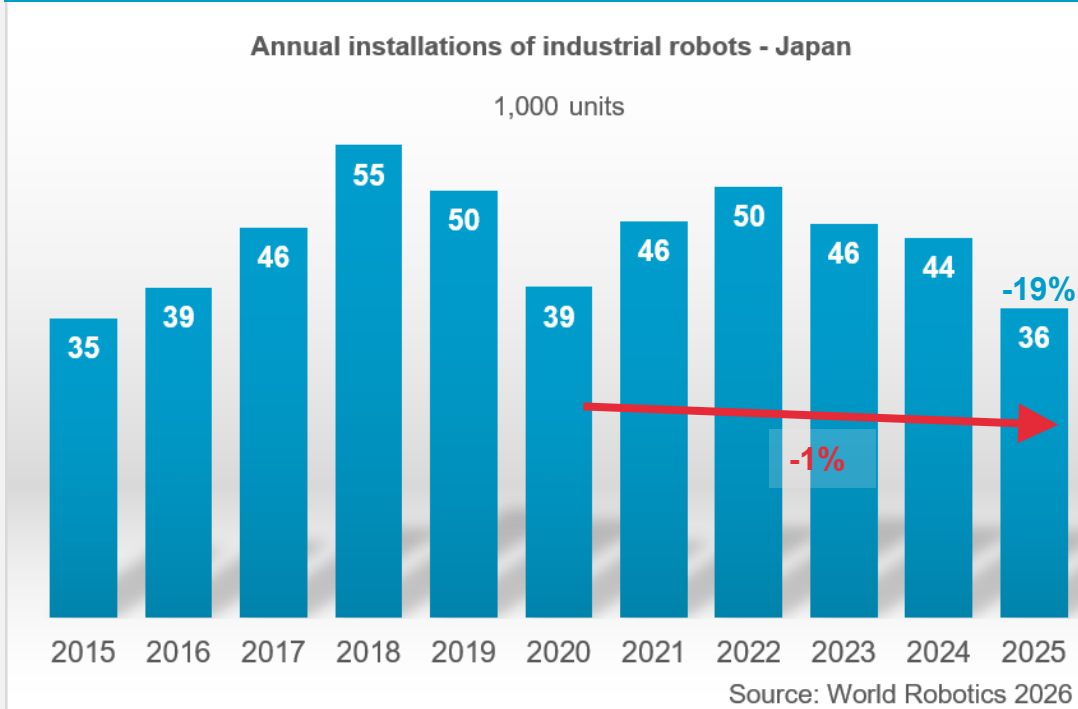
Growth rather outside of traditional downstreams



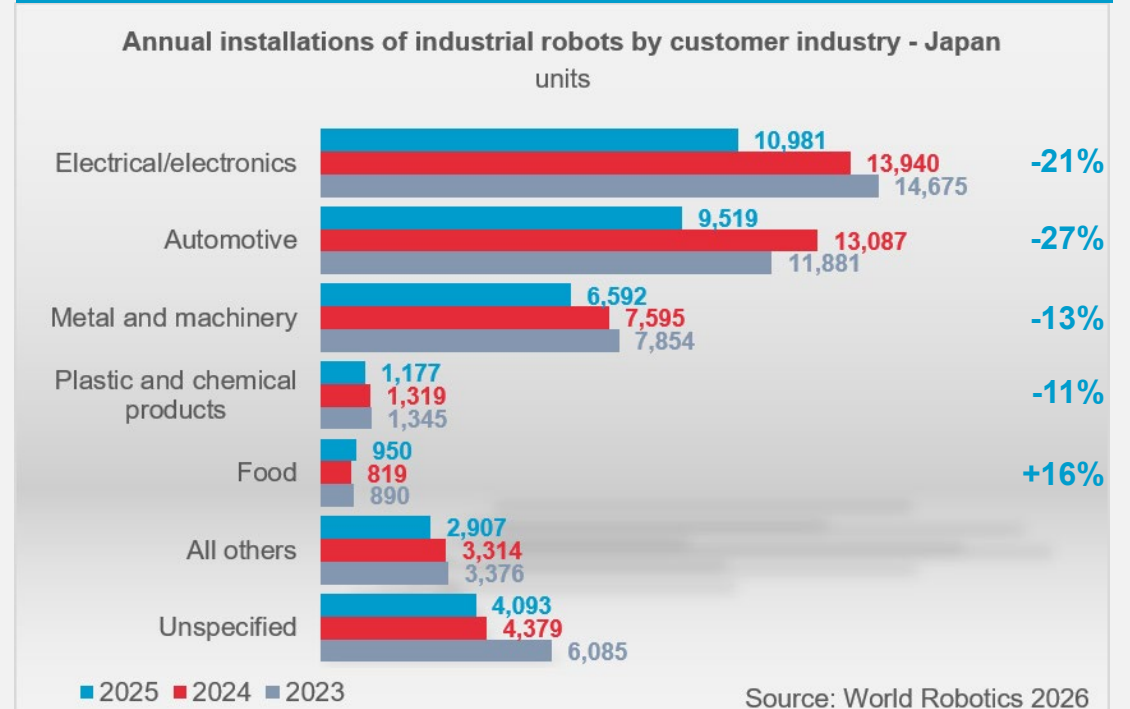
Japan: strong production and export but weak domestic market



Installations the lowest in a decade



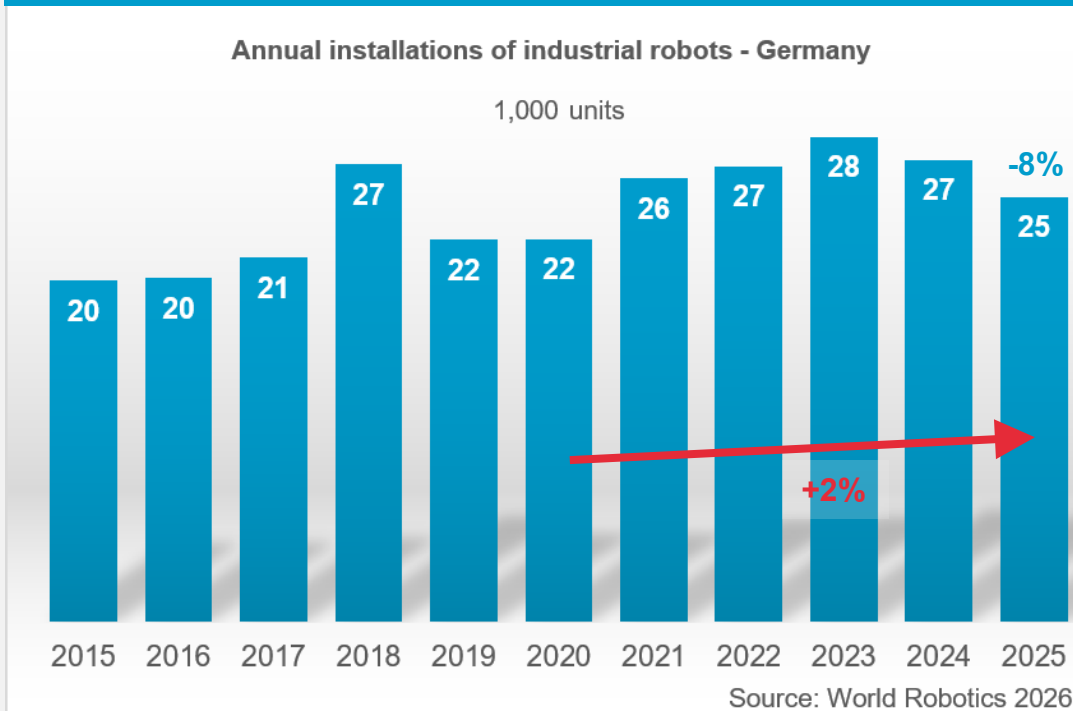
Electronics and automotive industry decline



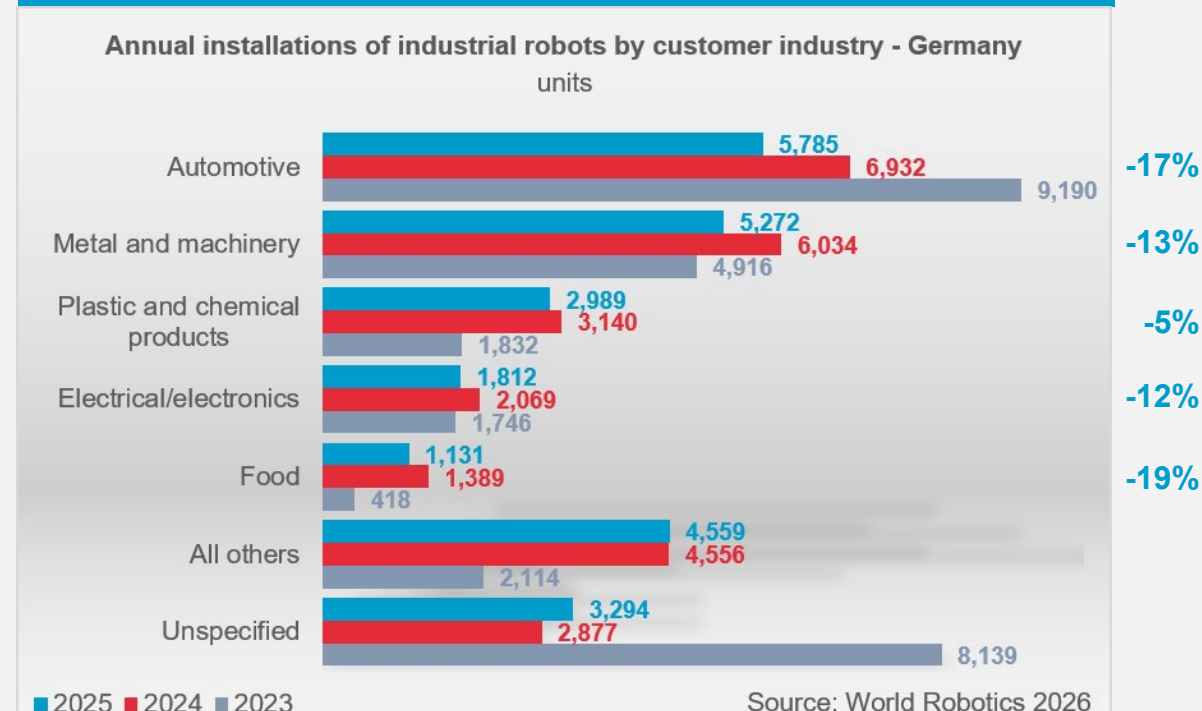
Germany remains largest European market despite weakness



Germany remains in recession



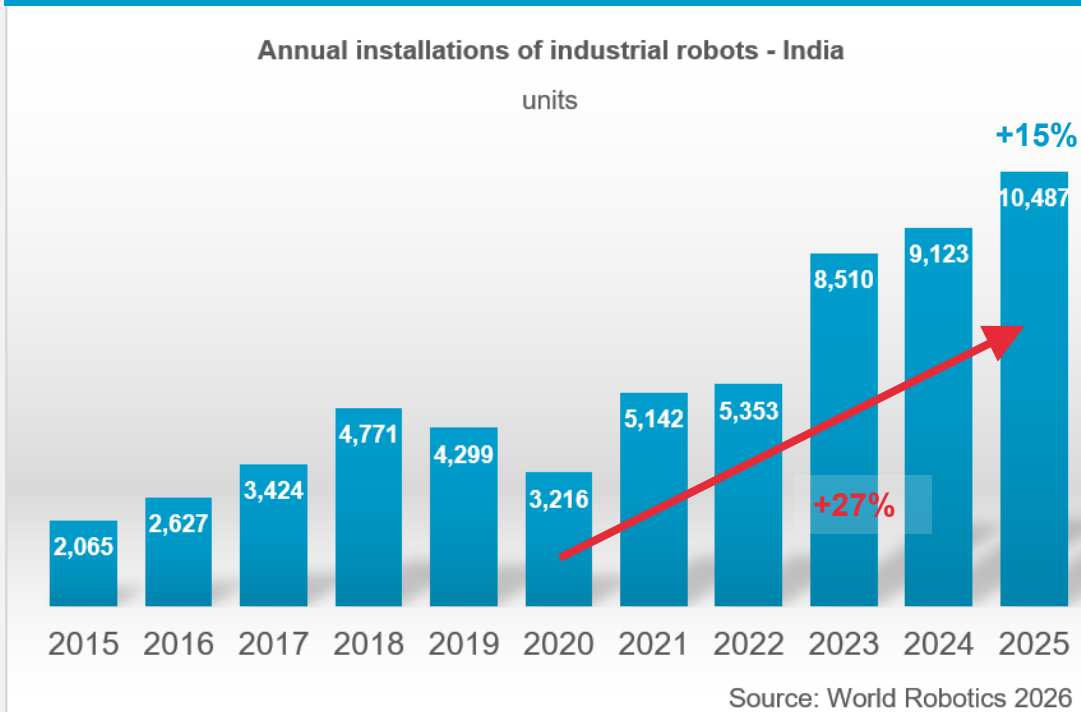
Steep decline along most industries



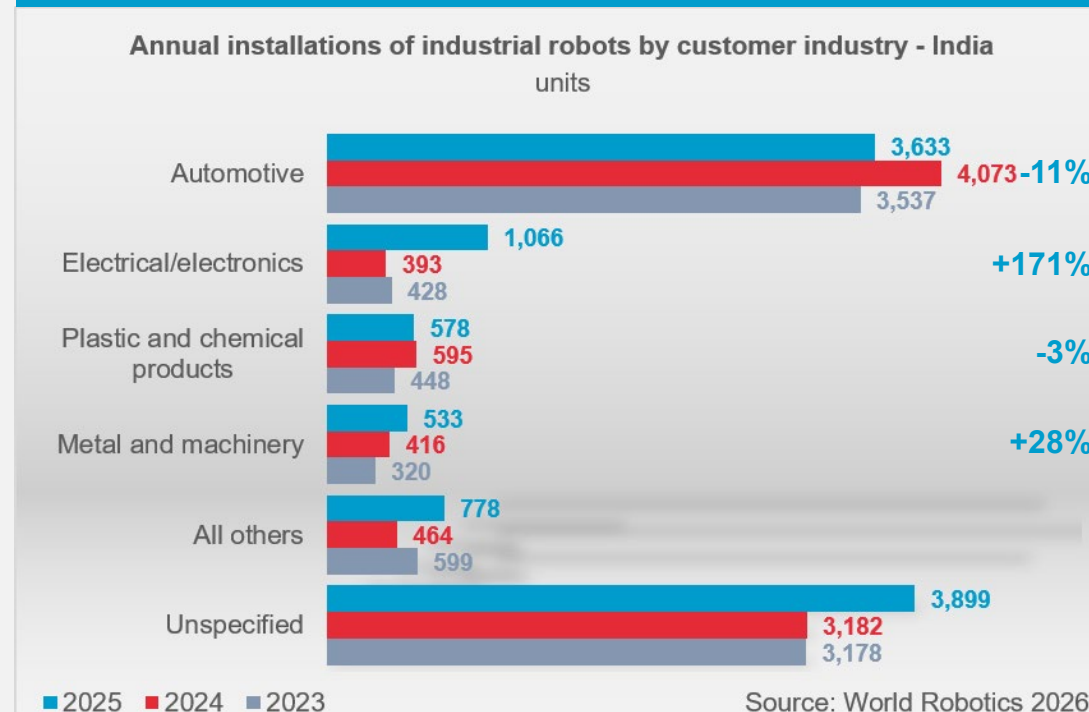
Indian robot demand continues to grow strongly



India: robot demand tripled over 5 years

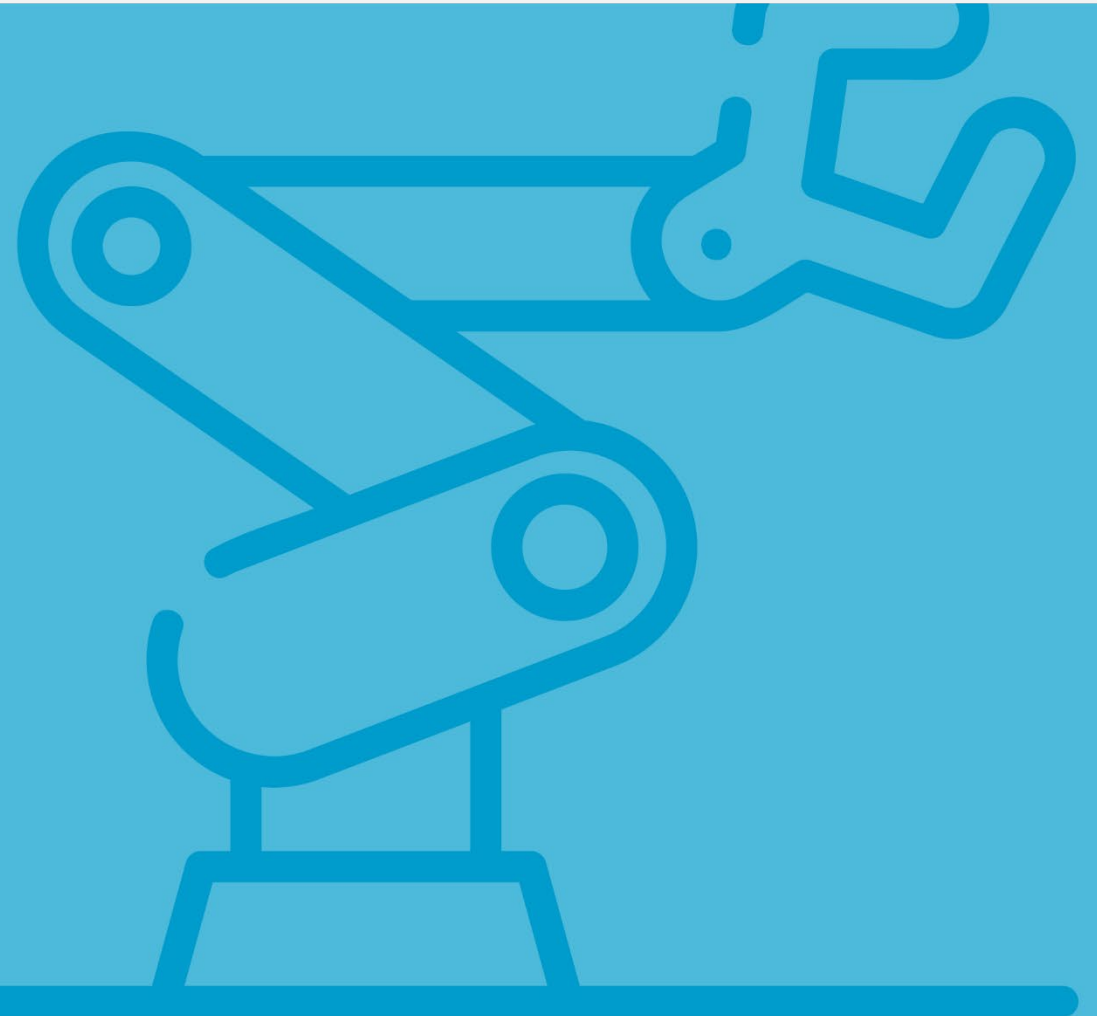


Electronics emerging as customer industry



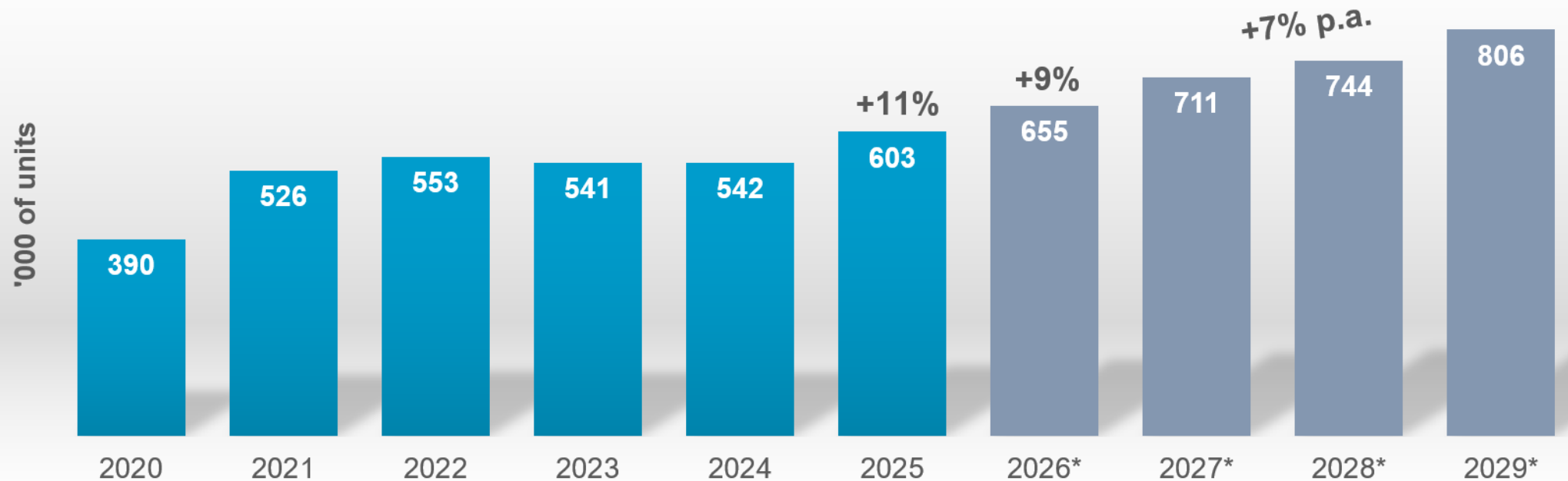
Outlook for Industrial Robotics

Forecasts and Future Trends



Forecast 2026+ Global Growth Trajectory Remains Positive

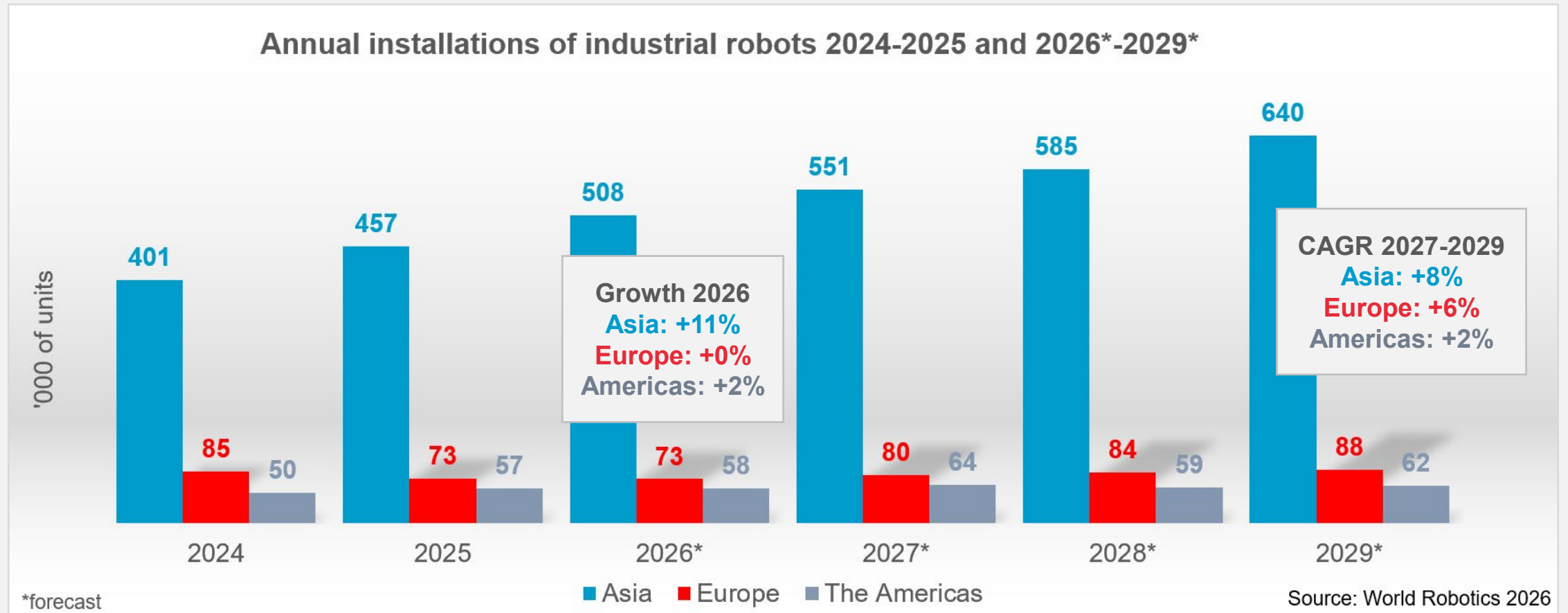
Annual installations of industrial robots 2020-2025 and 2026*-2029*



*forecast

Source: World Robotics 2026

Regional Growth Patterns Vary Significantly

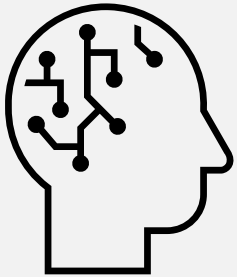


Key Factors Shaping Robot Demand



- **Economic growth** remains uneven
- **Geopolitical tensions** continue to affect global business
- **Trade restrictions** and **industrial strategies** gain importance
- **Investment** decisions remain **cautious**
- Rising labor costs strengthen the case for automation
- **Supply-chain transformation** drives robot demand

Technology Trends Driving the Next Generation of Robotics

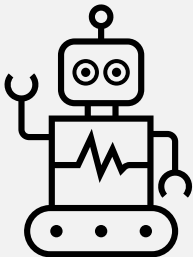
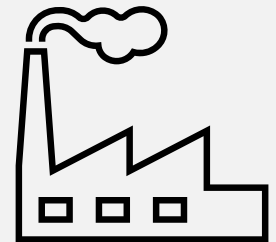


■ AI & Autonomy

- AI as an enabler for robotics
- Machine vision, sensing and data-driven optimization
- More adaptive task execution and easier programming

■ IT meets OT

- Robots as part of connected production systems
- Open interfaces, interoperability, factory data integration



■ Humanoids as Innovation Drivers

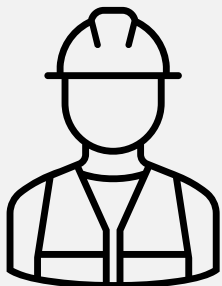
- Technology yet to prove reliability and efficiency
- Visible innovation that will spill over to established robot forms

Business Priorities Shaping Automation Adoption



■ Safety and Security

- Cybersecurity becomes as important as safety
- Secure-by-design architecture of connected robots
- AI validation and oversight

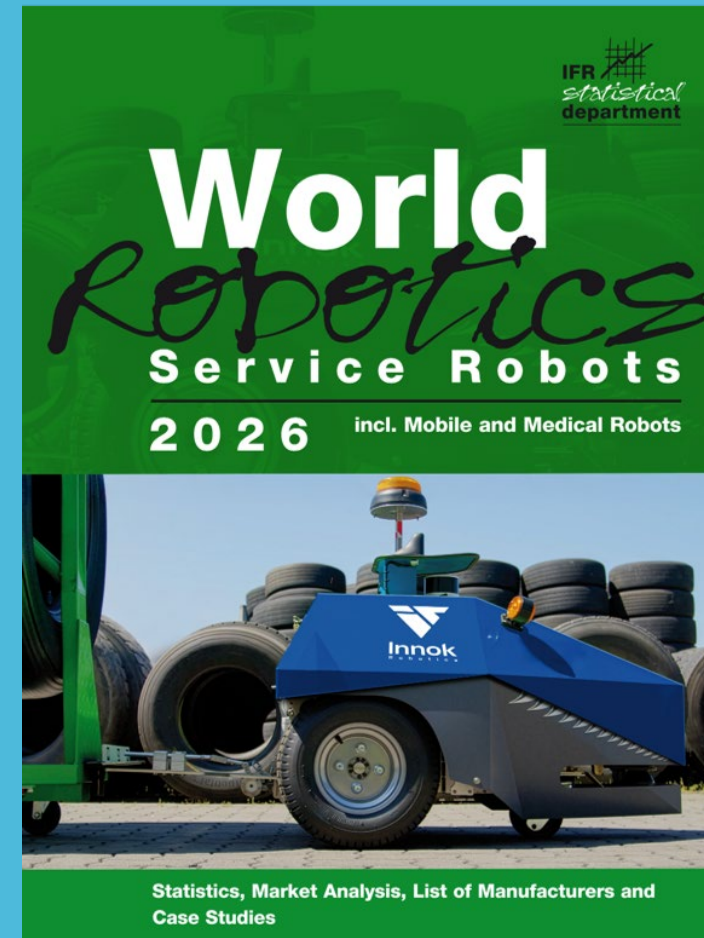


■ Tight Labor Markets

- Labor shortages increase demand for automation
- Reshoring activities create more cases of labor scarcity
- Tight supply of skilled professionals
- Training and reskilling to soften skill mismatches

Service Robots Expanding into Everyday Operations

A Market Gaining Momentum



From Start-ups to Scale-ups



Image: Pixel Robotics

+24%

**New
professional
service robots
(incl. AMRs)**

250,000 units



Image: Kawasaki

+19%

**New
medical
robots**

15,300 units



Image: Everybot

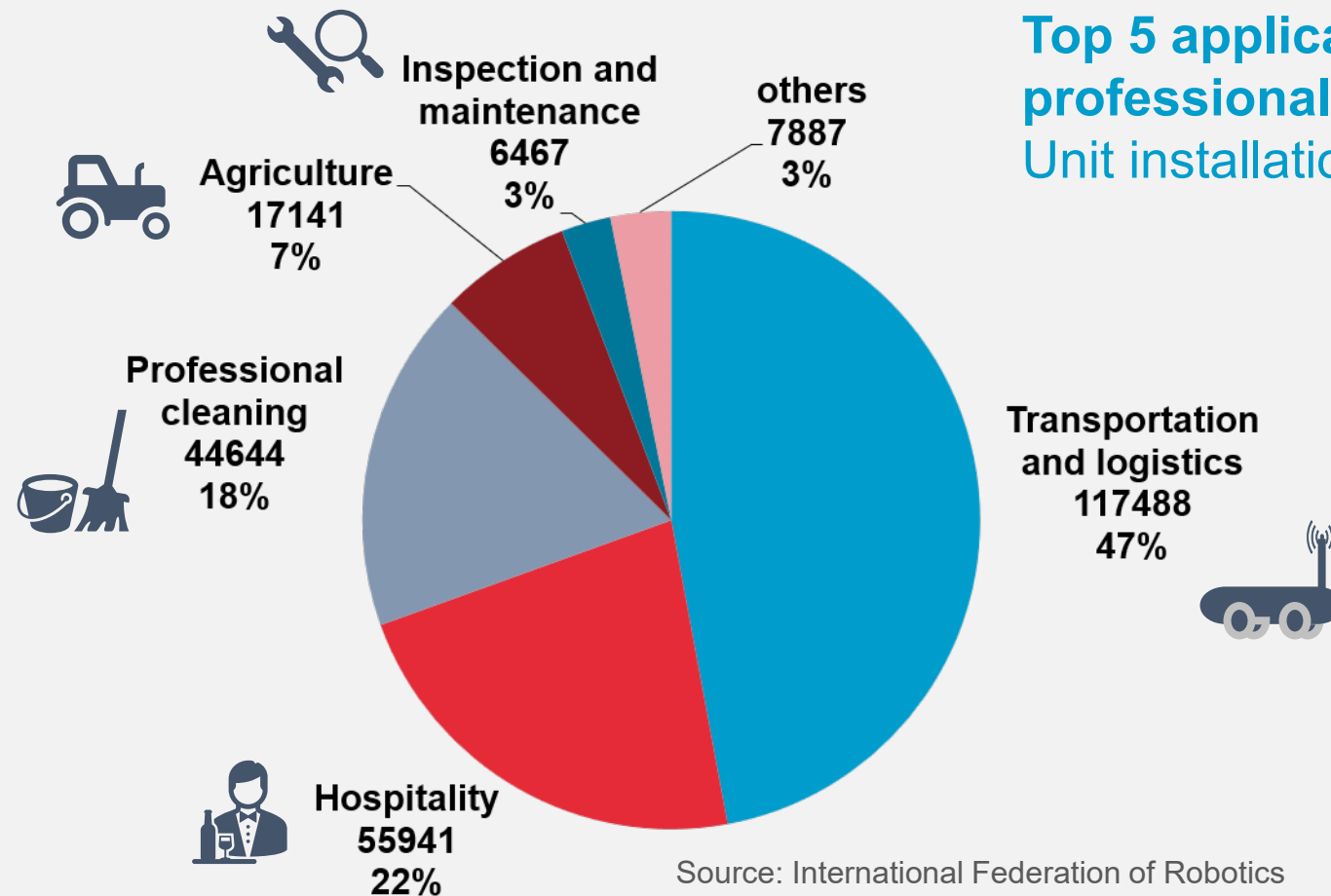
+37%

**New
consumer
service robots**

34.2 m units

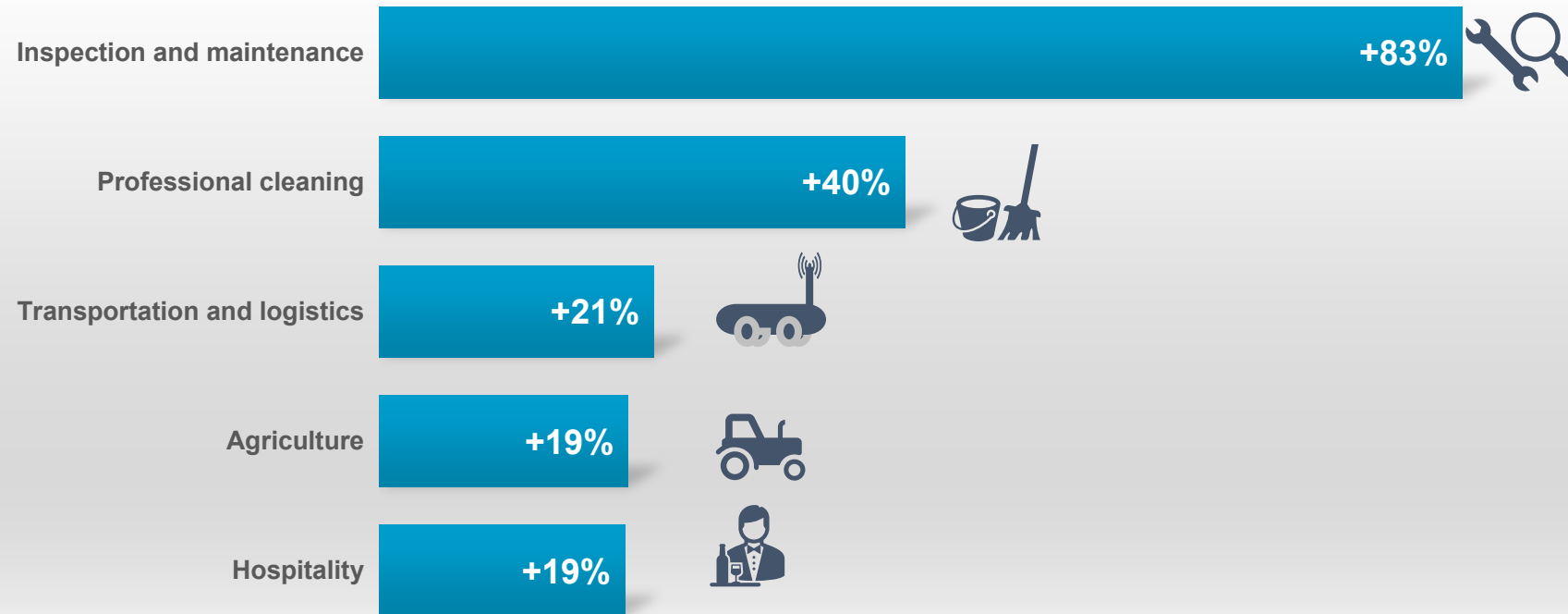
*All numbers based on a sample of 238 producers of total 1001 manufacturers.
Data is not projected to the whole industry.
Sample composition varies each year.
Compiling or comparing data from different survey waves is strongly discouraged.

Almost Every Other Robot is Sold for Transportation and Logistics



Growth Drivers: Inspection & Professional Cleaning

Growth rates for the Top 5 applications of Service robots for professional use in 2024 and 2025



Source: International Federation of Robotics

Focus: Construction and Demolition

- Driven by a **productivity gap** in construction
- **Major challenges**
 - Multitude of different tasks in onsite construction
 - Highly dynamic, unstructured environments
 - Work on construction sites highly fragmented due to numerous contractors
 - Regional differences in construction practices
- **Small and fragmented market**



Image: Hadrian by Fastbrick Robotics

Focus: Humanoids

- Nearly 7,000 humanoid robots* were sold worldwide in 2025.
- Humanoid robots are still on the verge of making the leap from laboratories to pilots – let alone real deployments.
- Driven by advances in generative AI e.g. VLAs
- **Major challenges:**
 - Safety and functional reliability
 - Lack of training data
 - Lack of economic viable business case



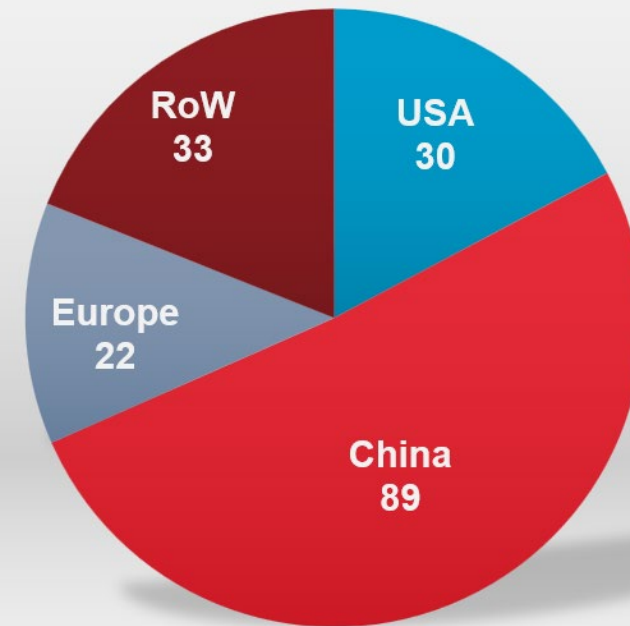
Image: Apptronik

* Full-size humanoids, height above 140cm

Humanoids Emerge as Robotics' Newest Market

- IFR has identified **174 humanoid robot manufacturers** globally.
- More than 50% in China
- Many manufacturers founded only in recent years.
- A notable wave of new company creation coincides with breakthroughs in **Gen AI**
- Large number demonstrates substantial investment and innovation in the field.

Humanoid robot suppliers by origin



Source: International Federation of Robotics

Trend towards regionality

Short- and long-term perspectives



Image: Staubli Robotics

- **Good growth market** with excellent long-term prospects
- Key drivers: **Demographic change** and **lack of skilled workers**
- **RaaS business models** lower adoption barriers considerably
- **Cybersecurity and protective trade regimes** might favor **local made robots** in the medium term, but could lower unit sales in the short term

Thank you for your attention.

IFR International Federation of Robotics

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<https://ifr.org/>



<https://www.youtube.com/c/IFRInternationalFederationofRobotics>



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