

**Mobile Robots Market by Type (Professional and Personal & Domestic Robots),  
Application (Agricultural, Cleaning, Educational, Healthcare, Manufacturing,  
Warehousing & Logistics) and Region (North America, Europe, APAC, ROW) - Global  
Forecast to 2028**

Market Report | 2023-07-20 | 202 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The mobile robots market is estimated to be worth USD 20.3 billion in 2023 and is projected to reach USD 40.6 billion by 2028, at a CAGR of 14.9% during the forecast period. The growth of this market is attributed to the rising demand for mobile robots for healthcare and personal use and advancement in robotics technology.

"Personal & Domestic Robots type is expected to account for the second largest share in mobile robots market in 2023."

The growth of personal and domestic robots is expected to accelerate due to advancements in technology, making them more accessible and affordable for consumers. These robots are becoming increasingly capable and affordable, offering various functions that range from household chores and entertainment to healthcare support. While personal robots serve as assistants or companions, domestic robots focus on specific tasks like cleaning, lawn mowing, and home security monitoring. The convenience, efficiency, and potential for enhancing our quality of life are key factors driving the higher growth rate of these robots in the mobile robots market. The rising demand for automation and smart home solutions, along with the continuous progress in artificial intelligence and sensor technologies, indicates that personal and domestic robots will revolutionize our daily lives and how we interact with technology.

"Agriculture application to hold the second largest share of mobile robots market in 2022."

As the global population continues to grow and the need for sustainable food production becomes more urgent, there is a strong demand for innovative technologies in agriculture. The use of mobile robots holds great promise in transforming farming practices through the automation of various tasks, including planting, harvesting, crop monitoring, and precision spraying. These robots are capable of navigating uneven terrain, collecting real-time data, and executing operations with remarkable precision, leading to

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scott-international.com](mailto:support@scott-international.com)

[www.scott-international.com](http://www.scott-international.com)

increased efficiency, reduced labor costs, and optimized resource utilization. Moreover, mobile robots empower farmers to make data-driven decisions, boost productivity, and minimize the environmental impact of their operations. As the agricultural industry increasingly embraces automation and integrates robotics, the adoption of mobile robots in farming is poised to have a significant impact, positioning it as a crucial player in the mobile robots market.

"North America to hold the largest market share of mobile robots market in 2022."

North America benefits from a strong technological infrastructure and a thriving research and development ecosystem, which foster innovation in the field of robotics. Furthermore, the region's prominent tech companies, start-ups, and academic institutions dedicated to robotics play a crucial role in driving advancements in mobile robot technologies. Industries like manufacturing, healthcare, logistics, and defense actively embrace mobile robots in North America, seeking to enhance operational efficiency and gain a competitive advantage. Moreover, increasing demand for mobile robots in military applications and increasing demand for personal applications, such as education and entertainment, drives the mobile robots market in North America.

The break-up of the profiles of primary participants:

- By Company Type - Tier 1 - 45%, Tier 2 - 30%, and Tier 3 - 25%
- By Designation - C-level Executives - 35%, Directors - 45%, and Others - 20%
- By Region - North America - 30%, Europe - 25%, Asia Pacific - 35%, and Rest of the World - 10%

Major players in the mobile robots market KUKA (Germany), ABB (Switzerland), Honda Motor (Japan), Mobile Industrial Robots (Denmark) and Omron Automation (US).

Research Coverage

The report segments the mobile robots market by type, application, and region. The report also comprehensively reviews drivers, restraints, opportunities, and challenges influencing market growth. The report also covers qualitative aspects in addition to the quantitative aspects of the market.

Reasons to buy the report:

The report will help the market leaders/new entrants with information on the closest approximate revenues for the overall mobile robots market and related segments. This report will help stakeholders understand the competitive landscape and gain more insights to strengthen their position in the market and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

- Analysis of key drivers (increasing adoption of mobile robots for healthcare and personal use, rapid growth of mobile robots in e-commerce and warehousing, rapid advancements in robotics and artificial intelligence is driving the market), restraints (limited adaptability of mobile robots to unstructured environments, high initial investment and technological issues is hindering the growth of the market), opportunities (adoption of industry 4.0 technologies in warehousing and industrial automation, increased demand for customized mobile robots), and challenges (integration of mobile robots with existing system, lack of skilled workforce to operate mobile robots) influencing the growth of the mobile robots market.
- Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product launches in the mobile robots market.
- Market Development: Comprehensive information about lucrative markets - the report analyses the mobile robots market across varied regions.
- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the mobile robots market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like KUKA (Germany), ABB (Switzerland), Honda Motor (Japan), Mobile Industrial Robots (Denmark) and Omron Automation (US).

## **Table of Contents:**

- 1□INTRODUCTION□27
- 1.1□STUDY OBJECTIVES□27
- 1.2□MARKET DEFINITION□27
- 1.3□STUDY SCOPE□28

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.3.1	MARKETS COVERED	28
FIGURE 1	MOBILE ROBOTS MARKET: SEGMENTATION	28
1.3.2	GEOGRAPHICAL SCOPE	28
1.3.3	YEARS CONSIDERED	29
1.3.4	INCLUSIONS AND EXCLUSIONS	29
1.4	CURRENCY CONSIDERED	29
1.5	STAKEHOLDERS	29
1.6	SUMMARY OF CHANGES	30
1.7	RECESSION IMPACT	30
2	RESEARCH METHODOLOGY	31
2.1	RESEARCH DATA	31
FIGURE 2	MOBILE ROBOTS MARKET: RESEARCH DESIGN	31
2.1.1	SECONDARY DATA	32
2.1.1.1	List of major secondary sources	32
2.1.1.2	Key data from secondary sources	32
2.1.2	PRIMARY DATA	32
2.1.2.1	Primary interviews with experts	33
2.1.2.2	Breakdown of primaries	33
2.1.2.3	Key data from primary sources	33
2.1.3	SECONDARY AND PRIMARY RESEARCH	34
2.1.3.1	Key industry insights	35
2.2	MARKET SIZE ESTIMATION	35
2.2.1	BOTTOM-UP APPROACH	36
2.2.1.1	Approach to derive market size by bottom-up analysis (demand side)	36
FIGURE 3	MOBILE ROBOTS MARKET: BOTTOM-UP APPROACH	36
2.2.2	TOP-DOWN APPROACH	37
2.2.2.1	Approach to derive market size by top-down analysis (supply side)	37
FIGURE 4	MOBILE ROBOTS MARKET: TOP-DOWN APPROACH	37
FIGURE 5	MARKET SIZE ESTIMATION METHODOLOGY (SUPPLY SIDE): REVENUE GENERATED BY KEY PLAYERS THROUGH SALES OF MOBILE ROBOTS	38
2.3	MARKET BREAKDOWN AND DATA TRIANGULATION	39
FIGURE 6	DATA TRIANGULATION	39
2.4	RESEARCH ASSUMPTIONS	40
2.5	PARAMETERS CONSIDERED TO ANALYZE IMPACT OF RECESSION ON MOBILE ROBOTS MARKET	40
2.6	LIMITATIONS	41
2.7	RISK ASSESSMENT	41
3	EXECUTIVE SUMMARY	42
FIGURE 7	MOBILE ROBOTS MARKET, 2019?2028	42
FIGURE 8	PROFESSIONAL ROBOTS SEGMENT ACCOUNTED FOR LARGER SHARE OF MARKET IN 2022	43
FIGURE 9	CLEANING SEGMENT ACCOUNTED FOR LARGEST MARKET SIZE IN 2022	43
FIGURE 10	NORTH AMERICA HELD LARGEST MARKET SHARE IN 2022	44
4	PREMIUM INSIGHTS	45
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN MOBILE ROBOTS MARKET	45
FIGURE 11	ADOPTION OF INDUSTRY 4.0 TECHNOLOGIES IN WAREHOUSING AND INDUSTRIAL PLANTS TO CREATE OPPORTUNITIES FOR MARKET PLAYERS	45
4.2	MOBILE ROBOTS MARKET, BY TYPE	45
FIGURE 12	PROFESSIONAL ROBOTS TO ACCOUNT FOR LARGER SHARE OF MOBILE ROBOTS MARKET DURING 2023-2028	45

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.3	MOBILE ROBOTS MARKET, BY APPLICATION	46
FIGURE 13	CLEANING SEGMENT TO HOLD LARGEST SHARE OF MOBILE ROBOTS MARKET IN 2023	46
4.4	MOBILE ROBOTS MARKET, BY COUNTRY	46
FIGURE 14	CHINA TO REGISTER HIGHEST CAGR IN MOBILE ROBOTS MARKET DURING FORECAST PERIOD	46
5	MARKET OVERVIEW	47
5.1	INTRODUCTION	47
5.2	MARKET DYNAMICS	47
FIGURE 15	MOBILE ROBOTS MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES	47
5.2.1	DRIVERS	48
5.2.1.1	Increasing usage of mobile robots for healthcare and personal use	48
5.2.1.2	Rapid adoption of mobile robots for e-commerce and logistics applications	48
5.2.1.3	Continuous advancements in robotics and artificial intelligence	49
FIGURE 16	MOBILE ROBOTS MARKET: IMPACT ANALYSIS OF DRIVERS	50
5.2.2	RESTRAINTS	50
5.2.2.1	Limited adaptability of mobile robots to unstructured environments	50
5.2.2.2	Need for substantial upfront investment and technological limitations of mobile robots	51
FIGURE 17	MOBILE ROBOTS MARKET: IMPACT ANALYSIS OF RESTRAINTS	51
5.2.3	OPPORTUNITIES	52
5.2.3.1	Adoption of industry 4.0 to automate warehousing and industrial plants	52
5.2.3.2	Increasing demand for customized mobile robots	52
FIGURE 18	MOBILE ROBOTS MARKET: IMPACT ANALYSIS OF OPPORTUNITIES	53
5.2.4	CHALLENGES	53
5.2.4.1	Integration of mobile robots with existing systems	53
5.2.4.2	Lack of skilled workforce to operate mobile robots	53
FIGURE 19	MOBILE ROBOTS MARKET: IMPACT ANALYSIS OF CHALLENGES	54
5.3	SUPPLY CHAIN ANALYSIS	55
FIGURE 20	MOBILE ROBOTS MARKET: SUPPLY CHAIN ANALYSIS	55
5.4	ECOSYSTEM MAPPING	56
FIGURE 21	MOBILE ROBOTS MARKET: ECOSYSTEM MAP	56
TABLE 1	MOBILE ROBOTS MARKET: ROLE OF KEY PLAYERS IN ECOSYSTEM	57
5.5	PRICING ANALYSIS	58
5.5.1	AVERAGE SELLING PRICE (ASP) TREND	58
TABLE 2	AVERAGE SELLING PRICE OF AUTONOMOUS MOBILE ROBOTS WITH VARIOUS PAYLOAD CAPACITIES	58
TABLE 3	AVERAGE SELLING PRICE OF AUTONOMOUS MOBILE ROBOTS, BY REGION	58
FIGURE 22	AVERAGE SELLING PRICE OF AUTONOMOUS MOBILE ROBOTS, 2019-2028	59
5.5.2	PRICING ANALYSIS OF AUTONOMOUS MOBILE ROBOTS OFFERED BY KEY PLAYERS	59
FIGURE 23	AVERAGE SELLING PRICE OF AUTONOMOUS MOBILE ROBOTS OFFERED BY KEY PLAYERS, BY PAYLOAD CAPACITY	59
TABLE 4	AVERAGE SELLING PRICE OF AUTONOMOUS MOBILE ROBOTS OFFERED BY KEY PLAYERS, BY PAYLOAD CAPACITY	60
5.6	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	60
FIGURE 24	REVENUE SHIFTS AND NEW REVENUE POCKETS FOR MOBILE ROBOTS VENDORS	60
5.7	TECHNOLOGY ANALYSIS	61
5.7.1	ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING	61
5.7.2	PREDICTIVE ANALYTICS	61
5.7.3	WIRELESS COMMUNICATION	61
5.7.4	IOT AND INDUSTRY 4.0	62
5.7.5	HUMAN-ROBOT COLLABORATION	62
5.7.6	CLOUD ROBOTICS	62

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.8	PORTER'S FIVE FORCES ANALYSIS	63
	FIGURE 25	MOBILE ROBOTS MARKET: PORTER'S FIVE FORCES ANALYSIS
	TABLE 5	MOBILE ROBOTS MARKET: PORTER'S FIVE FORCES ANALYSIS
5.8.1	THREAT OF NEW ENTRANTS	64
5.8.2	THREAT OF SUBSTITUTES	64
5.8.3	BARGAINING POWER OF SUPPLIERS	64
5.8.4	BARGAINING POWER OF BUYERS	64
5.8.5	INTENSITY OF COMPETITIVE RIVALRY	65
5.9	KEY STAKEHOLDERS AND BUYING CRITERIA	65
5.9.1	KEY STAKEHOLDERS IN BUYING PROCESS	65
	FIGURE 26	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE APPLICATIONS
	TABLE 6	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE APPLICATIONS
5.9.2	BUYING CRITERIA	66
	FIGURE 27	KEY BUYING CRITERIA FOR TOP THREE APPLICATIONS
	TABLE 7	KEY BUYING CRITERIA FOR TOP THREE APPLICATIONS
5.10	CASE STUDY ANALYSIS	67
	TABLE 8	DORMAN PRODUCTS DEPLOYED PALLET TRANSPORT 1500 ROBOT OFFERED BY FETCH ROBOTICS TO REDUCE TRAVEL WASTE
	TABLE 9	SADDLE CREEK DEPLOYED MOBILE ROBOTS OFFERED BY LOCUS ROBOTICS TO HANDLE INCREASED ORDER VOLUME
	TABLE 10	MANUFACTURING FIRM DEPLOYED MOBILE ROBOTS OFFERED BY OTTO MOTORS TO AUTOMATE MATERIAL TRANSPORTATION
	TABLE 11	HANDLING SPECIALTY PROVIDED CUSTOM-ENGINEERED AUTOMATED GUIDED VEHICLES TO CLIENT
5.11	TRADE ANALYSIS	68
5.11.1	IMPORT SCENARIO	68
	FIGURE 28	IMPORT DATA, BY KEY COUNTRY, 2018-2022 (USD MILLION)
5.11.2	EXPORT SCENARIO	69
	FIGURE 29	EXPORT DATA, BY KEY COUNTRY, 2018-2022 (USD MILLION)
5.12	PATENT ANALYSIS	70
	FIGURE 30	TOP 10 COMPANIES WITH HIGHEST NUMBER OF PATENT APPLICATIONS IN LAST 10 YEARS
	FIGURE 31	NO. OF PATENTS GRANTED ANNUALLY OVER LAST 10 YEARS RELATED TO MOBILE ROBOTS MARKET
	TABLE 12	LIST OF PATENTS RELATED TO MOBILE ROBOTS MARKET
5.13	KEY CONFERENCES & EVENTS, 2023-2025	74
	TABLE 13	MOBILE ROBOTS MARKET: KEY CONFERENCES AND EVENTS
5.14	REGULATORY LANDSCAPE	75
5.14.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	75
	TABLE 14	NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
	TABLE 15	EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
	TABLE 16	ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
	TABLE 17	REST OF THE WORLD: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
5.14.2	STANDARDS AND REGULATIONS RELATED TO MOBILE ROBOTS	77
5.14.3	SAFETY STANDARDS FOR MOBILE ROBOTS	78
	TABLE 18	SAFETY STANDARDS FOR MOBILE ROBOTS
	?	
6	TRENDS AND EMERGING APPLICATION AREAS RELATED TO MOBILE ROBOTS	80
6.1	INTRODUCTION	80
6.2	TRENDS RELATED TO MOBILE ROBOTS	80
6.2.1	HUMAN-ROBOT COLLABORATION AND INTERACTION	80

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.2.2	WIRELESS COMMUNICATION	80	
6.2.3	RECONFIGURABLE ROBOTS	81	
6.2.4	EDGE COMPUTING AND CLOUD ROBOTICS	81	
6.2.5	SIMULTANEOUS LOCALIZATION AND MAPPING (SLAM)	81	
6.3	EMERGING APPLICATION AREAS OF MOBILE ROBOTS	82	
6.3.1	FOOD DELIVERY	82	
6.3.2	HOSPITALITY AND CUSTOMER SERVICE	82	
6.3.3	DISASTER RESPONSE AND RESCUE	82	
6.3.4	CONSTRUCTION AND BUILDING AUTOMATION	83	
6.3.5	WASTE MANAGEMENT	83	
7	OFFERINGS IN MOBILE ROBOTS MARKET	84	
7.1	INTRODUCTION	84	
7.2	HARDWARE	84	
7.2.1	SENSORS	84	
7.2.2	ACTUATORS	84	
7.2.3	POWER SUPPLIES	85	
7.2.4	CONTROL SYSTEMS	85	
7.2.5	OTHERS	85	
7.3	SOFTWARE & SERVICES	86	
8	MOBILE ROBOTS MARKET, BY TYPE	87	
8.1	INTRODUCTION	88	
	FIGURE 32	MOBILE ROBOTS MARKET, BY TYPE	88
	FIGURE 33	PROFESSIONAL ROBOTS SEGMENT TO HOLD LARGER SHARE OF MOBILE ROBOTS MARKET DURING FORECAST PERIOD	88
	TABLE 19	MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION)	88
	TABLE 20	MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION)	89
8.2	PROFESSIONAL ROBOTS	89	
	TABLE 21	PROFESSIONAL ROBOTS: MOBILE ROBOTS MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	90
	TABLE 22	PROFESSIONAL ROBOTS: MOBILE ROBOTS MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	90
	TABLE 23	PROFESSIONAL ROBOTS: MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION)	90
	TABLE 24	PROFESSIONAL ROBOTS: MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION)	91
8.2.1	AUTONOMOUS MOBILE ROBOTS	91	
8.2.1.1	Can navigate in known environments without human intervention	91	
	TABLE 25	AUTONOMOUS MOBILE ROBOTS MARKET, BY PAYLOAD CAPACITY, 2019-2022 (USD MILLION)	91
	TABLE 26	AUTONOMOUS MOBILE ROBOTS MARKET, BY PAYLOAD CAPACITY, 2023-2028 (USD MILLION)	92
	TABLE 27	AUTONOMOUS MOBILE ROBOTS MARKET, BY NAVIGATION TECHNOLOGY, 2019-2022 (USD MILLION)	92
	TABLE 28	AUTONOMOUS MOBILE ROBOTS MARKET, BY NAVIGATION TECHNOLOGY, 2023-2028 (USD MILLION)	92
	TABLE 29	AUTONOMOUS MOBILE ROBOTS MARKET, BY INDUSTRY, 2019-2022 (USD MILLION)	93
	TABLE 30	AUTONOMOUS MOBILE ROBOTS MARKET, BY INDUSTRY, 2023-2028 (USD MILLION)	93
	TABLE 31	AUTONOMOUS MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION)	93
	TABLE 32	AUTONOMOUS MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION)	94
	TABLE 33	NORTH AMERICA: AUTONOMOUS MOBILE ROBOTS MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	94
	TABLE 34	NORTH AMERICA: AUTONOMOUS MOBILE ROBOTS MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	94
	TABLE 35	EUROPE: AUTONOMOUS MOBILE ROBOTS MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	95
	TABLE 36	EUROPE: AUTONOMOUS MOBILE ROBOTS MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	95
	TABLE 37	ASIA PACIFIC: AUTONOMOUS MOBILE ROBOTS MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	95
	TABLE 38	ASIA PACIFIC: AUTONOMOUS MOBILE ROBOTS MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	96
	TABLE 39	ROW: AUTONOMOUS MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION)	96

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 40□ROW: AUTONOMOUS MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION)□96

8.2.2□AUTOMATED GUIDED VEHICLES□97

8.2.2.1□Used for material handling in various industries to reduce damages and labor costs□97

TABLE 41□AUTOMATED GUIDED VEHICLES MARKET, BY TYPE, 2019-2022 (USD MILLION)□97

TABLE 42□AUTOMATED GUIDED VEHICLES MARKET, BY TYPE, 2023-2028 (USD MILLION)□97

TABLE 43□AUTOMATED GUIDED VEHICLES MARKET, BY NAVIGATION TECHNOLOGY, 2019-2022 (USD MILLION)□98

TABLE 44□AUTOMATED GUIDED VEHICLES MARKET, BY NAVIGATION TECHNOLOGY, 2023-2028 (USD MILLION)□98

TABLE 45□AUTOMATED GUIDED VEHICLES MARKET, BY INDUSTRY, 2019-2022 (USD MILLION)□99

TABLE 46□AUTOMATED GUIDED VEHICLES MARKET, BY INDUSTRY, 2023-2028 (USD MILLION)□99

TABLE 47□AUTOMATED GUIDED VEHICLES MARKET, BY REGION, 2019-2022 (USD MILLION)□100

TABLE 48□AUTOMATED GUIDED VEHICLES MARKET, BY REGION, 2023-2028 (USD MILLION)□100

8.2.3□OTHERS□100

8.3□PERSONAL & DOMESTIC ROBOTS□101

8.3.1□LARGELY ADOPTED FOR CLEANING APPLICATIONS□101

TABLE 49□PERSONAL & DOMESTIC ROBOTS: MOBILE ROBOTS MARKET, BY APPLICATION, 2019-2022 (USD MILLION)□102

TABLE 50□PERSONAL & DOMESTIC ROBOTS: MOBILE ROBOTS MARKET, BY APPLICATION, 2023-2028 (USD MILLION)□102

TABLE 51□PERSONAL & DOMESTIC ROBOTS: MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION)□102

TABLE 52□PERSONAL & DOMESTIC ROBOTS: MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION)□103

9□MOBILE ROBOTS MARKET, BY APPLICATION□104

9.1□INTRODUCTION□105

FIGURE 34□MOBILE ROBOTS MARKET, BY APPLICATION□105

FIGURE 35□CLEANING SEGMENT TO HOLD LARGEST SHARE OF MOBILE ROBOTS MARKET DURING FORECAST PERIOD□105

TABLE 53□MOBILE ROBOTS MARKET, BY APPLICATION, 2019-2022 (USD MILLION)□106

TABLE 54□MOBILE ROBOTS MARKET, BY APPLICATION, 2023-2028 (USD MILLION)□106

9.2□AGRICULTURAL□107

9.2.1□MOBILE ROBOTS MAJORLY USED FOR LIVESTOCK MANAGEMENT, FEEDING, AND CLEANING APPLICATIONS□107

TABLE 55□AGRICULTURAL: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION)□107

TABLE 56□AGRICULTURAL: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION)□107

TABLE 57□AGRICULTURAL: MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION)□108

TABLE 58□AGRICULTURAL: MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION)□108

9.3□CLEANING□108

9.3.1□MOBILE ROBOTS MAKE FOR MORE HYGIENIC ALTERNATIVE TO TRADITIONAL CLEANING METHODS□108

TABLE 59□CLEANING: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION)□109

TABLE 60□CLEANING: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION)□109

TABLE 61□CLEANING: MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION)□109

TABLE 62□CLEANING: MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION)□109

9.4□EDUCATIONAL□110

9.4.1□MOBILE ROBOTS PROMOTE COLLABORATIVE LEARNING IN EDUCATION□110

TABLE 63□EDUCATIONAL: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION)□110

TABLE 64□EDUCATIONAL: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION)□111

TABLE 65□EDUCATIONAL: MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION)□111

TABLE 66□EDUCATIONAL: MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION)□111

9.5□HEALTHCARE□112

9.5.1□MOBILE ROBOTS SUPPORT PATIENTS AND MEDICAL STAFF□112

FIGURE 36□NORTH AMERICA TO HOLD LARGEST SHARE OF MOBILE ROBOTS MARKET FOR HEALTHCARE APPLICATIONS FROM 2023 TO 2028□112

TABLE 67□HEALTHCARE: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION)□113

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 68 HEALTHCARE: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 113

TABLE 69 HEALTHCARE: MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION) 113

TABLE 70 HEALTHCARE: MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION) 113

9.6 MANUFACTURING 114

9.6.1 MOBILE ROBOTS EASE WORKFLOW IN OPERATIONS 114

TABLE 71 MANUFACTURING: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION) 114

TABLE 72 MANUFACTURING: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 114

TABLE 73 MANUFACTURING: MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION) 115

TABLE 74 MANUFACTURING: MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION) 115

9.7 WAREHOUSING & LOGISTICS 115

9.7.1 MOBILE ROBOTS ADOPTED FOR MATERIAL HANDLING 115

TABLE 75 WAREHOUSING & LOGISTICS: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION) 116

TABLE 76 WAREHOUSING & LOGISTICS: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 116

TABLE 77 WAREHOUSING & LOGISTICS: MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION) 116

TABLE 78 WAREHOUSING & LOGISTICS: MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION) 117

9.8 OTHERS 117

TABLE 79 OTHERS: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION) 117

TABLE 80 OTHERS: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 118

TABLE 81 OTHERS: MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION) 118

TABLE 82 OTHERS: MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION) 118

10 MOBILE ROBOTS MARKET, BY REGION 119

10.1 INTRODUCTION 120

FIGURE 37 MOBILE ROBOTS MARKET IN CHINA TO REGISTER HIGHEST CAGR FROM 2023 TO 2028 120

TABLE 83 MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION) 120

TABLE 84 MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION) 121

10.2 NORTH AMERICA 121

10.2.1 NORTH AMERICA: RECESSION IMPACT 121

FIGURE 38 NORTH AMERICA: MOBILE ROBOTS MARKET SNAPSHOT 122

TABLE 85 NORTH AMERICA: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION) 122

TABLE 86 NORTH AMERICA: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 123

TABLE 87 NORTH AMERICA: MOBILE ROBOTS MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 123

TABLE 88 NORTH AMERICA: MOBILE ROBOTS MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 123

TABLE 89 NORTH AMERICA: MOBILE ROBOTS MARKET, BY COUNTRY, 2019-2022 (USD MILLION) 124

TABLE 90 NORTH AMERICA: MOBILE ROBOTS MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 124

10.2.2 US 124

10.2.2.1 Rapid technological advancements and innovation in field of robotics to propel market growth 124

10.2.3 CANADA 125

10.2.3.1 Thriving industrial ecosystem to support market growth 125

10.2.4 MEXICO 125

10.2.4.1 Evolving economy and growing adoption of mobile robots in manufacturing to drive market 125

10.3 EUROPE 125

10.3.1 EUROPE: RECESSION IMPACT 125

FIGURE 39 EUROPE: MOBILE ROBOTS MARKET SNAPSHOT 126

TABLE 91 EUROPE: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION) 126

TABLE 92 EUROPE: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION) 127

TABLE 93 EUROPE: MOBILE ROBOTS MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 127

TABLE 94 EUROPE: MOBILE ROBOTS MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 127

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 95	EUROPE: MOBILE ROBOTS MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	128
TABLE 96	EUROPE: MOBILE ROBOTS MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	128
10.3.2	UK	128
10.3.2.1	Government initiatives to boost automation to lead to adoption of mobile robots	128
10.3.3	GERMANY	129
10.3.3.1	Rising adoption of automation solutions by several manufacturing firms to boost market growth	129
10.3.4	FRANCE	129
10.3.4.1	Rising investments in automation and robotics solutions to create opportunities for market players	129
10.3.5	REST OF EUROPE	129
10.4	ASIA PACIFIC	130
10.4.1	ASIA PACIFIC: RECESSION IMPACT	130
FIGURE 40	ASIA PACIFIC: MOBILE ROBOTS MARKET SNAPSHOT	131
TABLE 97	ASIA PACIFIC: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION)	131
TABLE 98	ASIA PACIFIC: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION)	132
TABLE 99	ASIA PACIFIC: MOBILE ROBOTS MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	132
TABLE 100	ASIA PACIFIC: MOBILE ROBOTS MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	132
TABLE 101	ASIA PACIFIC: MOBILE ROBOTS MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	133
TABLE 102	ASIA PACIFIC: MOBILE ROBOTS MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	133
10.4.2	JAPAN	133
10.4.2.1	Increasing demand from healthcare and manufacturing sectors to support market growth	133
10.4.3	CHINA	134
10.4.3.1	Aging population and growing acceptance of robotics in eldercare to create substantial demand for mobile robots	134
10.4.4	SOUTH KOREA	134
10.4.4.1	Rising trend of automation in manufacturing sector to create opportunities for market players	134
10.4.5	REST OF ASIA PACIFIC	134
10.5	REST OF THE WORLD (ROW)	135
10.5.1	ROW: RECESSION IMPACT	135
TABLE 103	ROW: MOBILE ROBOTS MARKET, BY TYPE, 2019-2022 (USD MILLION)	135
TABLE 104	ROW: MOBILE ROBOTS MARKET, BY TYPE, 2023-2028 (USD MILLION)	135
TABLE 105	ROW: MOBILE ROBOTS MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	136
TABLE 106	ROW: MOBILE ROBOTS MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	136
TABLE 107	ROW: MOBILE ROBOTS MARKET, BY REGION, 2019-2022 (USD MILLION)	136
TABLE 108	ROW: MOBILE ROBOTS MARKET, BY REGION, 2023-2028 (USD MILLION)	137
10.5.2	MIDDLE EAST & AFRICA	137
10.5.2.1	Increasing adoption of mobile robots for educational and cleaning applications to drive market	137
10.5.3	SOUTH AMERICA	137
10.5.3.1	Rising adoption of mobile robots for agricultural and educational applications to accelerate market growth	137
	?	
11	COMPETITIVE LANDSCAPE	138
11.1	OVERVIEW	138
11.2	STRATEGIES ADOPTED BY KEY PLAYERS	138
TABLE 109	OVERVIEW OF STRATEGIES ADOPTED BY MOBILE ROBOTS VENDORS	138
11.3	REVENUE ANALYSIS OF TOP COMPANIES	139
FIGURE 41	FIVE-YEAR REVENUE ANALYSIS OF TOP PLAYERS IN MOBILE ROBOTS MARKET	139
11.4	MARKET SHARE ANALYSIS	140
TABLE 110	AUTONOMOUS MOBILE ROBOTS MARKET SHARE ANALYSIS, 2022	140
FIGURE 42	AUTONOMOUS MOBILE ROBOTS MARKET: SHARE OF KEY PLAYERS	140

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.5 COMPANY EVALUATION MATRIX 141

11.5.1 STARS 141

11.5.2 EMERGING LEADERS 141

11.5.3 PERVASIVE PLAYERS 141

11.5.4 PARTICIPANTS 142

FIGURE 43 MOBILE ROBOTS MARKET (GLOBAL): COMPANY EVALUATION MATRIX, 2022 142

11.6 SMALL AND MEDIUM-SIZED ENTERPRISES (SMES) EVALUATION MATRIX 142

11.6.1 PROGRESSIVE COMPANIES 142

11.6.2 RESPONSIVE COMPANIES 143

11.6.3 DYNAMIC COMPANIES 143

11.6.4 STARTING BLOCKS 143

FIGURE 44 MOBILE ROBOTS MARKET (GLOBAL): STARTUPS/SMES EVALUATION MATRIX, 2022 143

11.7 MOBILE ROBOTS MARKET: COMPANY FOOTPRINT 144

TABLE 111 COMPANY FOOTPRINT 144

TABLE 112 TYPE: COMPANY FOOTPRINT 145

TABLE 113 APPLICATION: COMPANY FOOTPRINT 146

TABLE 114 REGION: COMPANY FOOTPRINT 147

11.8 COMPETITIVE BENCHMARKING 148

TABLE 115 MOBILE ROBOTS MARKET: LIST OF KEY STARTUPS/SMES 148

TABLE 116 MOBILE ROBOTS MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES 148

11.9 COMPETITIVE SCENARIOS AND TRENDS 149

TABLE 117 MOBILE ROBOTS MARKET: PRODUCT LAUNCHES, 2021-2023 149

TABLE 118 MOBILE ROBOTS MARKET: DEALS, 2021-2023 151

?

12 COMPANY PROFILES 154

(Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats))\*

12.1 KEY PLAYERS 154

12.1.1 KUKA AG 154

TABLE 119 KUKA AG: COMPANY OVERVIEW 154

FIGURE 45 KUKA AG: COMPANY SNAPSHOT 155

TABLE 120 KUKA AG: PRODUCT OFFERINGS 155

TABLE 121 KUKA AG: PRODUCT LAUNCHES 156

TABLE 122 KUKA AG: DEALS 156

12.1.2 ABB 158

TABLE 123 ABB: COMPANY OVERVIEW 158

FIGURE 46 ABB: COMPANY SNAPSHOT 159

TABLE 124 ABB: PRODUCT OFFERINGS 159

TABLE 125 ABB: PRODUCT LAUNCHES 160

TABLE 126 ABB: DEALS 160

12.1.3 HONDA MOTOR CO., LTD. 162

TABLE 127 HONDA MOTOR CO., LTD.: COMPANY OVERVIEW 162

FIGURE 47 HONDA MOTOR CO., LTD.: COMPANY SNAPSHOT 163

TABLE 128 HONDA MOTOR CO., LTD.: PRODUCT OFFERINGS 163

TABLE 129 HONDA MOTOR CO., LTD.: PRODUCT LAUNCHES 164

12.1.4 MOBILE INDUSTRIAL ROBOTS 165

TABLE 130 MOBILE INDUSTRIAL ROBOTS: COMPANY OVERVIEW 165

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 131	MOBILE INDUSTRIAL ROBOTS: PRODUCT OFFERINGS	165
TABLE 132	MOBILE INDUSTRIAL ROBOTS: PRODUCT LAUNCHES	166
TABLE 133	MOBILE INDUSTRIAL ROBOTS: DEALS	167
12.1.5	OMRON CORPORATION	168
TABLE 134	OMRON CORPORATION: COMPANY OVERVIEW	168
TABLE 135	OMRON CORPORATION: PRODUCT OFFERINGS	168
TABLE 136	OMRON CORPORATION: PRODUCT LAUNCHES	169
12.1.6	DENSO CORPORATION	170
TABLE 137	DENSO CORPORATION: COMPANY OVERVIEW	170
FIGURE 48	DENSO CORPORATION: COMPANY SNAPSHOT	171
TABLE 138	DENSO CORPORATION: PRODUCT OFFERINGS	171
TABLE 139	DENSO CORPORATION: DEALS	172
12.1.7	FANUC CORPORATION	173
TABLE 140	FANUC CORPORATION: COMPANY OVERVIEW	173
FIGURE 49	FANUC CORPORATION: COMPANY SNAPSHOT	174
TABLE 141	FANUC CORPORATION: PRODUCT OFFERINGS	174
TABLE 142	FANUC CORPORATION: PRODUCT LAUNCHES	175
TABLE 143	FANUC CORPORATION: DEALS	175
12.1.8	IROBOT CORPORATION	176
TABLE 144	IROBOT CORPORATION: COMPANY OVERVIEW	176
FIGURE 50	IROBOT CORPORATION: COMPANY SNAPSHOT	177
TABLE 145	IROBOT CORPORATION: PRODUCT OFFERINGS	177
TABLE 146	IROBOT CORPORATION: PRODUCT LAUNCHES	178
TABLE 147	IROBOT CORPORATION: DEALS	178
12.1.9	SAMSUNG	179
TABLE 148	SAMSUNG: COMPANY OVERVIEW	179
FIGURE 51	SAMSUNG: COMPANY SNAPSHOT	180
TABLE 149	SAMSUNG: PRODUCT OFFERINGS	180
TABLE 150	SAMSUNG: PRODUCT LAUNCHES	181
TABLE 151	SAMSUNG: DEALS	181
12.1.10	SOFTBANK ROBOTICS	182
TABLE 152	SOFTBANK ROBOTICS: COMPANY OVERVIEW	182
FIGURE 52	SOFTBANK GROUP: COMPANY SNAPSHOT	183
TABLE 153	SOFTBANK ROBOTICS: PRODUCT OFFERINGS	184
TABLE 154	SOFTBANK ROBOTICS: PRODUCT LAUNCHES	184
TABLE 155	SOFTBANK ROBOTICS: DEALS	185
12.2	OTHER PLAYERS	186
12.2.1	ANYBOTICS	186
12.2.2	BLUE FROG ROBOTICS	187
12.2.3	BOSTON DYNAMICS	188
12.2.4	CLEARPATH ROBOTICS INC.	189
12.2.5	HANGZHOU DEEP ROBOTICS	189
12.2.6	SEIKO EPSON CORPORATION	190
12.2.7	FETCH ROBOTICS, INC.	191
12.2.8	GREYORANGE	192
12.2.9	GHOST ROBOTICS CORPORATION	193
12.2.10	HARVEST AUTOMATION	194

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.2.11	PROMOBOT	194
12.2.12	SHARK ROBOTICS	195
12.2.13	UBTECH ROBOTICS CORP LTD	196
12.2.14	UNITREE ROBOTICS	197
12.2.15	YASKAWA ELECTRIC CORPORATION	197
*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.		
13	ADJACENT MARKET	198
13.1	RFID MARKET	198
13.2	INTRODUCTION	198
FIGURE 53	RFID MARKET, BY OFFERING	198
FIGURE 54	TAGS SEGMENT TO ACCOUNT FOR LARGEST SHARE OF RFID MARKET DURING FORECAST PERIOD	199
TABLE 156	RFID MARKET, BY OFFERING, 2018-2021 (USD MILLION)	199
TABLE 157	RFID MARKET, BY OFFERING, 2022-2030 (USD MILLION)	199
13.3	TAGS	200
13.3.1	USED TO IDENTIFY ASSETS OR PERSON	200
13.4	READERS	200
13.4.1	FIXED READERS	201
13.4.1.1	Fixed readers make for rugged and cost-efficient solutions	201
13.4.2	HANDHELD READERS	201
13.4.2.1	Adopted due to their mobility	201
13.5	SOFTWARE & SERVICES	202
13.5.1	INCREASING ADOPTION OF DATA ANALYSIS AND CLOUD-BASED DATA STORAGE TO DRIVE DEMAND FOR SOFTWARE AND SERVICES	202
14	APPENDIX	203
14.1	INSIGHTS FROM INDUSTRY EXPERTS	203
14.2	DISCUSSION GUIDE	203
14.3	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	205
14.4	CUSTOMIZATION OPTIONS	207
14.5	RELATED REPORTS	207
14.6	AUTHOR DETAILS	208

**Mobile Robots Market by Type (Professional and Personal & Domestic Robots),  
Application (Agricultural, Cleaning, Educational, Healthcare, Manufacturing,  
Warehousing & Logistics) and Region (North America, Europe, APAC, ROW) - Global  
Forecast to 2028**

Market Report | 2023-07-20 | 202 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code\*

Country\*

Date

2026-03-11

Signature

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)