

## **Southeast Asia Industrial And Service Robot - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 172 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The Southeast Asian industrial and service robot market size is expected to witness a growth from USD 1.11 billion in 2024 to USD 1.62 billion by 2029 at a CAGR of 7.92% during the forecast period.

The market volume for the Southeast Asian industrial robot market was expected to reach 1,455 thousand units in 2028 from 812.7 thousand units in 2022.

The increasing developments in Southeast Asia regarding auto parts, electronics manufacturing, and logistics industries are lead remarkable progress in robot adoption. Numerous factors are probably contributing to the accelerated rates of robot adoption in the region. Several leading countries in the region have successfully set national goals and implemented distinctive strategies to encourage robotics innovation and promote the adoption of robots. Certain Southeast Asian nations have implemented proactive tax policies to incentivize adopting advanced robot technology.

-The increasing adoption of the Internet of Things (IoT) and investments in robotics in various Southeast Asian regions have played a significant role in driving market growth. The emergence of Industry 4.0, the latest industrial revolution, has also stimulated the advancement of innovative technologies, such as collaborative robots and AI-enabled robots. These advancements have empowered industries to enhance operational efficiency, reduce errors, and streamline numerous processes. The utilization of robotic systems has led to enhanced workplace safety and improved production capabilities, prompting further investments in this technology.

-The attractive lower operating costs in Southeast Asian countries have led global industrial robot companies to consider shifting their production capacity to the region. It is also enhancing productivity in sectors such as logistics, which involve various tasks that will greatly rely on the availability of more cost-effective robots. It is worth noting that robots are already making significant contributions to boosting productivity. They are involved in tasks such as waste collection, street cleaning, food preparation, and

**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)

delivery and offering room service in hotels. The potential advantages and opportunities presented by industrial and service robots appear to be limitless.

-On the other hand, it is important to note that one of the major challenges for the market is the ever-changing needs and preferences of end users and their limited knowledge about upcoming technologies. The integration of technology also brings along cyber risks, which can make it susceptible to vulnerabilities.

-During the COVID-19 pandemic, there was an increased emphasis on digital transformation in various industries in Southeast Asian countries. This resulted in a greater utilization of robots in the region. Vietnam, for example, faced challenges but was projected by the Asian Development Bank (ADB) to be one of the fastest-growing economies in Southeast Asia. In response to the situation, the country employed robots and drones for tasks such as transporting medical supplies, infectious samples, essential goods, sterilization, and monitoring public areas.

## Southeast Asia Industrial and Service Robot Market Trends

### Electronics/Electrical to Witness Growth

- Industrial robots like articulated industrial robots and SCARA are heavily used in the electronics/electrical industry. Articulated robots are used for assembling electronic components and devices. They can handle delicate and precise tasks such as soldering and inserting components onto circuit boards. They are utilized in pick-and-place operations and are extremely useful in high-speed production lines where efficiency and precision are crucial. They can also perform visual inspections, check for defects, and ensure that products meet specific standards.
- Further, according to Statistics Malaysia, the manufacturing of electronic components and boards, communication equipment, and consumer electronics in Malaysia was estimated to contribute 4.9% to the gross domestic products in 2022, an increase from 4.6% in 2021. The manufacturing industry in Malaysia had a 23.4% share of the GDP in the same year, with electronic components manufacturing as the biggest contributor.
- Additionally, according to the Singapore Department of Statistics, in 2022, the industrial production index of computers, electronics, and optical products in Singapore was 129.24. This was the highest value in a decade. Singapore is among the leading manufacturers of electronics such as semiconductors worldwide, which is likely to amp up the growth in the market studied.
- In October 2022, armed with low prices and sophisticated technology, a prominent Indonesian contract manufacturer, Satnusa, announced that it is utilizing the global shift away from Chinese production to diversify its client base and become one of Southeast Asia's major players. Satnusa is wooing the US and European companies looking to shift production from mainland China and Taiwan to Southeast Asia. Many of the smartphones and other products it builds are currently sold in Indonesia.
- Satnusa benefits from government incentives as well. The entire island of Batam is designated a free trade zone, where companies enjoy cheaper import duties, streamlined export procedures, and other perks. Indonesia's government could provide additional benefits in a bid to boost exports. Such developments would offer several opportunities for the penetration of the market studied.

### Indonesia is Expected to Hold a Significant Share

- Indonesia is a notable industrial manufacturer that extensively embraces automation in its sectors. Manufacturing plays a significant role in a nation's GDP, with Indonesia's manufacturing sector contributing more than 18% to the country's economic output in 2022, making it the primary contributor. The strong manufacturing activities in Indonesia and Malaysia are expected to bolster the demand for the market under examination.
- According to local economic studies, it has been determined that micro, small, and medium enterprises (MSMEs) constitute more

**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)

than 99% of all business entities in Indonesia, with the food and beverage sector accounting for at least 44% of these enterprises. Consequently, the increasing adoption of technology in the manufacturing sectors of the region will significantly augment market prospects. As an illustration, the Indonesian government is actively encouraging the local food and beverage industry to embrace digital advancements and transition toward the utilization of technological innovations as an integral component of the national Making Industry 4.0 industrial strategy.

- As a result, the F&B sector is significantly witnessing innovative robotic adoption, and several vendors in the region are constantly investing in launching new solutions, which is creating a positive impact on the market's growth. For instance, in January 2022, GoFood made an announcement regarding its pioneering adoption of automated robot technology. The robot, affectionately named "Bellabot," is equipped with advanced features such as 3D sensors, sound detection, and touch-based interaction. This development reflects GoFood's unwavering commitment to enhancing the entire food ordering process and delivering an exceptional culinary experience to its users. By introducing this specialized robot, GoFood, as a part of the broader GoTo ecosystem, has become the first online food delivery (OFD) service in Indonesia to embrace automated robot technology. The implementation of automated robot technology by GoFood has been carried out in collaboration with PT Pudu Robot Indonesia. Such innovative vendor activities in enhancing technological adoption in the F&B sector will enhance the market's growth.

- Moreover, according to data provided by Statistics Indonesia (BPS), the food and beverage (F&B) industry experienced a 4.90% annual growth in 2022, reaching a value of IDR 813.062 billion (USD 51.82 billion). Additionally, the food and beverage manufacturing sector in Indonesia is projected to have a gross domestic product growth rate of approximately 4.9% in the same year. In addition, the country's GDP is expected to cross USD 2 trillion by 2028, according to the IMF. This notable expansion can be attributed to the increasing adoption of automation within the sector, which is expected to play a crucial role in driving market growth.

#### Southeast Asia Industrial and Service Robot Industry Overview

The market comprises market incumbents, global firms, and new players competing to assert dominance in an increasingly contested market space. Industry 4.0 and digitalization initiatives across regions provide lucrative opportunities in the industrial robot market. New companies have emerged, differentiating themselves with respect to the robot controlling abilities. With technologies such as IoT, artificial intelligence, and virtual/augmented reality, such companies prosper with sizable revenue gains.

Numerous companies and emerging robot start-ups are dedicated to developing cutting-edge and technologically sophisticated solutions for manufacturers to enhance efficiency. Prominent industry players are actively pursuing acquisition strategies and creating innovative and integrated robots to cater to the needs of end users. Therefore, companies are aiming for a powerful competitive strategy. Some of the major market players are FANUC Corporation, Yaskawa Electric Corporation, KUKA AG, ABB Ltd, Kawasaki Heavy Industries Ltd, and many more.

- In August 2023, Yaskawa Electric Corporation announced the launch of a new lineup of MOTOMAN-HC30PL (30 kg payload capacity, 1600 mm reach), a model for palletizing applications such as cardboard, for the human collaboration robot series that has been developed with 10 kg and 20 kg payload capacity.

- In May 2023, KUKA expanded a new edition robot by launching the series of KR CYBERTECH for efficient automation. The KR CYBERTECH feeds components into assembly processes, checks workpiece quality, and grinds and polishes metal parts. This flexibility is particularly popular in various sectors, including dynamic industries such as metals and electronics.

Additional Benefits:

**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)

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

## **Table of Contents:**

### **1 INTRODUCTION**

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

### **2 RESEARCH METHODOLOGY**

### **3 EXECUTIVE SUMMARY**

### **4 MARKET INSIGHTS**

- 4.1 Market Overview
- 4.2 Technological Advancements
- 4.3 Industry Attractiveness - Porter's Five Forces Analysis
  - 4.3.1 Bargaining Power of Suppliers
  - 4.3.2 Bargaining Power of Buyers
  - 4.3.3 Threat of New Entrants
  - 4.3.4 Threat of Substitutes Products
  - 4.3.5 Intensity of Competitive Rivalry
- 4.4 Impact of After-effects of COVID-19 Economic Situation and Political Uncertainties
- 4.5 Industry Value Chain Analysis

### **5 MARKET DYNAMICS**

- 5.1 Market Drivers
  - 5.1.1 Increasing Emphasis on Energy Efficiency and Cost Reduction
  - 5.1.2 Increasing Demand for Internet of Things (IOT) in Various Industrial Processes
- 5.2 Market Challenges/Restraints
  - 5.2.1 High Initial Investment and the Requirement of Skilled Workforce

### **6 MARKET SEGMENTATION**

- 6.1 By Product Category
  - 6.1.1 Industrial
    - 6.1.1.1 Articulated
    - 6.1.1.2 SCARA
    - 6.1.1.3 Other Product Categories
  - 6.1.2 Service
    - 6.1.2.1 Professional
    - 6.1.2.2 Domestic
- 6.2 By End-user Vertical
  - 6.2.1 Automotive
  - 6.2.2 Electronics/Electrical
  - 6.2.3 Plastic and Chemical
  - 6.2.4 Metal and Machinery
  - 6.2.5 Food, Beverages, and Tobacco
  - 6.2.6 Other Manufacturing Verticals

**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)

#### 6.2.7 Other Non-manufacturing Verticals

#### 6.3 By Country

##### 6.3.1 Indonesia

##### 6.3.2 Malaysia

##### 6.3.3 Singapore

##### 6.3.4 Thailand

##### 6.3.5 Vietnam

##### 6.3.6 Rest of Southeast Asia

### 7 COMPETITIVE LANDSCAPE

#### 7.1 Company Profiles\*

##### 7.1.1 FANUC Corporation

##### 7.1.2 Yaskawa Electric Corporation

##### 7.1.3 KUKA AG

##### 7.1.4 ABB Ltd

##### 7.1.5 Kawasaki Heavy Industries Ltd

##### 7.1.6 Seiko Epson Corporation

##### 7.1.7 Toshiba Corporation

##### 7.1.8 Nachi Robotic Systems Inc. (Nachi-fujikoshi Corp.)

##### 7.1.9 Omron Corporation

##### 7.1.10 Mitsubishi Electric Corporation

##### 7.1.11 Denso Corporation

##### 7.1.12 Shibaura Machine Co. Ltd

### 8 FUTURE OF THE MARKET

**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)

## Southeast Asia Industrial And Service Robot - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 172 pages | Mordor Intelligence

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 License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		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"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-06-25
		Signature	

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

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

www.scotts-international.com



**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)