

Europe Collaborative Robot Market Assessment, By Payload Capacity [Less than 5 kg, 5-10 kg, Above 10 kg], By Application [Material Handling, Assembly, Machine Tending, Palletizing and De-Palletizing, Others], By End-user [Automotive, Electronics, Metals and Machining, Food and Beverage, Chemicals and Pharmaceuticals, E-commerce and Logistics, Others], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Europe collaborative robot market is projected to witness a CAGR of 17.02% during the forecast period 2025-2032, growing from USD 587.59 million in 2024 to USD 2066.53 million in 2032F owing to rapid growth as industries prioritize automation, efficiency, and human-robot collaboration. Key trends include increasing adoption of SMEs, integration of AI and IoT for smarter operations, and expansion into sectors such as healthcare and logistics. Germany leads in industrial automation, while France and Italy focus on robotics-driven manufacturing. Scandinavian countries look upon flexible automation to address labor shortages, and Eastern Europe is emerging as a cost-competitive hub for robotic deployment. With strong government support, evolving regulations, and a shift towards Industry 5.0, Europe is at the forefront of the global collaborative robotics revolution. Hence, companies tend to expand their offerings in the region.

For instance, in October 2023, Shenzhen Yuejiang Technology Co., Ltd. (Dobot Robotics) expanded its offering in the German market, launching a new cobot series and its first German office location. With its newly founded subsidiary Dobot Europe GmbH as well as its first German office location near Frankfurt am Main, manufacturer Dobot Robotics will in the future focus on even closer cooperation with its local customers such as well-known automotive manufacturers and partners.

Workforce Shortage and SME Revolution to Fuel the Market Growth

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Europe faces significant labor shortages, particularly in manufacturing and logistics, due to an aging workforce and declining birth rates. Cobots help bridge this gap by assisting human workers in repetitive, physically demanding, or hazardous tasks. With user-friendly interfaces and safety features, cobots enable companies to maintain productivity without requiring extensive technical expertise. Governments and businesses are increasingly investing in collaborative robotics to sustain industrial output and compensate for the shrinking labor pool, driving market expansion. Businesses are building labs and hubs to develop and co-develop new robotic technology.

For instance, in November 2024, Universal Robots and Mobile Industrial Robots (MiR) opened the world's first collaborative robotics hub in Barcelona, Spain, aiming to become a center of innovation in collaborative automation in Southern Europe. The new hub is 1,500 m² that are occupied by each company's different offices, plus a joint showroom where the latest technology and applications for cobots is being demonstrated.

Small and medium-sized enterprises (SMEs) in Europe are increasingly adopting collaborative robots (cobots) to enhance efficiency, reduce operational costs, and address labor shortages. Unlike traditional industrial robots, cobots offer flexibility, affordability, and ease of integration, making them ideal for SMEs with limited space and resources.

AI, Machine Learning, and Government Initiatives to Fuel the Europe Collaborative Robot Market

The integration of artificial intelligence (AI) and machine learning (ML) into collaborative robots is revolutionizing automation in Europe. AI-powered cobots can adapt to dynamic environments, learn from human interactions, and perform complex tasks with greater precision. These advancements enhance cobots' versatility, making them suitable for applications in automotive, electronics, healthcare, and e-commerce industries.

European governments and regulatory bodies actively promote the adoption of collaborative robots through favorable policies, funding programs, and research initiatives. The EU's focus on Industry 5.0, emphasizing human-robot collaboration encourages businesses to integrate cobots for safer and more sustainable production. Entities, dealing with robotics networks and transformation are also pushing the government to promote AI, machine learning, and robotic technology in the market.

For instance, in February 2025, The Verband Deutscher Maschinen- und Anlagenbau (VDMA) Robotics + Automation urged immediate action to address the decline in global competitiveness of European economies in the fields of robotics and automation. This networking organization, representing the European robotics sector, has presented a "Robotics Action Plan for Europe" aimed at policymakers throughout the continent, including national governments and European Union bodies. In January 2025, the VDMA cautioned that Germany's robotics sector has experienced a loss of competitiveness, projecting a 9% decrease in total revenue for 2025, bringing it down to USD 14.4 billion.

Less Than 5 Kg Segment Holds the Largest Market Share

Based on payload capacity, the less than 5 Kg segment leads to the European market due to its versatility and affordability. These lightweight cobots are ideal for precise, repetitive tasks in industries such as electronics, pharmaceuticals, and food processing. Their compact design allows seamless integration into existing workflows, especially in SMEs, which prioritize cost-effective automation without extensive infrastructure changes.

Furthermore, the rising adoption of human-robot collaboration in assembly lines, quality inspection, and laboratory automation drives demand for small payload cobots. With advancements in AI and machine learning, these robots are becoming more intelligent, enhancing their ability to handle delicate tasks with precision. Companies from all over the world showcase their cobots for European markets.

For instance, in April 2024, JAKA Robotics Co., Ltd. launched the JAKA Zu 20, a new collaborative robot with a 3kg payload, at the Hannover Fair, a major European industry event, showcasing its capabilities in collaborative robotics. The robot was unveiled at the Hannover Fair, a prominent European trade show for industrial technology, highlighting its potential for European businesses.

Future Market Scenario (2025 - 2032F)

-□Future cobots in Europe are likely to leverage advanced AI and machine learning to enhance real-time decision-making, adaptability, and autonomous task execution.

-□Beyond manufacturing, collaborative robots are expected to increasingly be used in retail, healthcare, and hospitality for customer service, medical assistance, and logistics.

-□European factories are anticipated to adopt highly adaptable cobots capable of quick reprogramming to meet changing production demands and mass customization trends.

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-The market will see a rise in energy-efficient and eco-friendly cobots designed to support sustainable manufacturing and circular economic initiatives.

Key Players Landscape and Outlook

The key player strategy in the European collaborative robot market revolves around enhancing technological capabilities, expanding product portfolios, and fostering innovation to meet diverse industry demands. Players focus on developing advanced cobots with higher payload capacities, precision, and flexibility to cater to sectors like automotive, logistics, and electronics. Strategic initiatives include partnerships, mergers, and acquisitions to strengthen market presence and accelerate growth. Emphasis is placed on leveraging Industry 4.0 technologies to integrate cobots seamlessly into manufacturing processes, boosting efficiency while reducing costs. Additionally, targeting underpenetrated industries beyond automotive, such as food and beverages or pharmaceuticals, is a significant growth driver.

For instance, in February 2023, ABB Ltd revealed its new robot that brings together industrial and collaborative abilities. The company has introduced the SWIFTI CRB 1300, an industrial collaborative robot that boasts an enhanced load capacity of up to 11kg. This robot includes functionalities such as palletizing and pick-and-place, aiming to create a connection between traditional industrial robots and collaborative ones.

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15.3.10. Neura Robotics GmbH

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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