

Fab Automation Market By Automated Material Handling Systems, Robotics & Handling Equipment, Equipment Control Software, Advanced Process Control, 200 mm, 300 mm, Integrated Device Manufacturers (IDMs), Foundries, and OSATs - Global Forecast to 2032

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Report description:

The fab automation market is projected to reach USD 25.24 billion in 2025 and USD 41.44 billion by 2032, registering a CAGR of 7.3% between 2025 and 2032. The market is projected to witness substantial growth during the forecast period, driven by the increasing complexity of semiconductor manufacturing and the global push toward higher yields, faster cycle times, and greater operational consistency. Expanding 300 mm capacity, advanced-node production, and heterogeneous integration are accelerating the adoption of automated material handling systems (AMHS), robotics, manufacturing execution systems (MES), advanced process control (APC), yield management software (YMS), and AI-enabled analytics. These solutions enable fabs to achieve precision handling, real-time process optimization, and predictive maintenance, ensuring compliance with ultra-clean manufacturing standards. Growth is further supported by large-scale investments in new greenfield fabs, government semiconductor incentives, and the rising demand for chips powering AI, 5G, automotive electronics, and high-performance computing. However, high implementation costs, integration complexity, and the need for skilled technical resources may present operational challenges. Strengthening interoperability, modular deployments, and partnerships across the automation ecosystem will be essential to sustaining long-term market expansion.

<https://mnmimg.marketsandmarkets.com/Images/fab-automation-market-img-overview.webp>

"By end user, the outsourced semiconductor assembly & test (OSAT) providers segment is expected to register the highest CAGR between 2025 and 2032."

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The outsourced semiconductor assembly and test (OSAT) providers segment is expected to register the highest CAGR in the fab automation market between 2025 and 2032, driven by the rapid growth of advanced packaging, heterogeneous integration, and chiplet-based architectures. OSAT facilities are experiencing rising demand for high-precision, contamination-free, and high-throughput automation solutions to support complex processes such as wafer-level packaging (WLP), fan-out technologies, 2.5D/3D stacking, and advanced test operations. To manage increasing device complexity and shrinking tolerances, OSATs are deploying Automated Material Handling Systems (AMHS), robotics, smart inspection systems, Manufacturing Execution Systems (MES), Advanced Process Control (APC), and AI-enabled analytics to enhance yield, reduce operational variability, and maintain traceability across packaging and test workflows. The expansion of AI, HPC, automotive electronics, and 5G applications is further driving OSAT customers to demand faster cycle times, scalable production, and higher reliability. As packaging becomes a critical differentiator in semiconductor performance, OSATs are accelerating investments in digital transformation, automation upgrades, and cleanroom optimization. The combination of rising outsourcing trends, advanced packaging demand, and the need for cost-efficient, high-volume production positions OSAT providers as a pivotal and fast-growing end-user segment in the global fab automation market.

"Based on offering, the hardware segment is projected to account for the largest market share in 2032."

The hardware segment is projected to account for the largest share of the fab automation market by 2032, driven by the rapid expansion of semiconductor manufacturing capacity and the increasing demand for high-throughput, contamination-controlled production environments. As fabs scale advanced-node and 300mm lines, demand for robust hardware, including automated material handling systems (AMHS), robotics, wafer-handling equipment, environmental control systems, power and utility automation systems, and communication and networking hardware, continues to rise. These systems form the physical backbone of automated fabs, enabling precise wafer transport, maintaining stable cleanroom conditions, ensuring uninterrupted utility management, and ensuring reliable equipment connectivity. The surge in logic, memory, and advanced packaging production driven by AI, HPC, automotive electronics, and 5G applications is further accelerating investments in automation hardware. Greenfield fabs in the Asia Pacific, the US, and Europe are increasingly prioritizing end-to-end automated infrastructure to ensure yield consistency, reduce cycle time, and enhance operational resilience. Additionally, the modernization of brownfield facilities is boosting the adoption of next-generation robotics, AMHS upgrades, and advanced contamination control systems. As semiconductor processes become more complex and throughput requirements rise, hardware will remain the foundational and most heavily invested offering within the global fab automation landscape.

"The Americas region is projected to exhibit the highest CAGR from 2025 to 2032."

The Americas region is projected to exhibit the highest CAGR in the fab automation market from 2025 to 2032, driven by substantial investments in advanced semiconductor manufacturing, modernization of existing fabs, and renewed government focus on strengthening domestic chip production. The region, comprising the US and the Rest of the Americas, is advancing multiple greenfield and brownfield projects aimed at supporting leading-edge logic, memory, and heterogeneous integration technologies. As new fabs emphasize high-throughput, contamination-free, and energy-efficient operations, demand is rising for automated material handling systems (AMHS), robotics, environmental control systems, advanced metrology hardware, and factory communication infrastructure. The US leads regional growth, fueled by substantial capital expenditure from IDMs, foundries, and OSATs, alongside incentives under national semiconductor policies that prioritize automation, digital transformation, and workforce optimization. Increasing adoption of sub-10 nm and EUV-enabled processes is further accelerating the need for precision handling equipment and intelligent automation platforms. Meanwhile, countries in the Rest of the Americas are expanding backend assembly, test, and packaging capabilities, creating additional demand for scalable, cost-efficient automation solutions. Collectively, strong policy support, rising semiconductor consumption, and large-scale capacity expansion position the Americas as a high-growth hub for next-generation fab automation.

The break-up of the profile of primary participants in the fab automation market-

-[]By Company Type: Tier 1 - 35%, Tier 2 - 45%, Tier 3 - 20%

-[]By Designation: C-level Executives - 40%, Directors - 30%, Others - 30%

-[]By Region: Americas - 40%, EMEA - 25%, Asia Pacific - 35%

Note: Other designations include sales, marketing, and product managers.

The three tiers of the companies are based on their total revenues as of 2024: Tier 1: >USD 1 billion, Tier 2: USD 500 million-1

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billion, and Tier 3: USD 500 million.

The major players in the fab automation market with a significant global presence include Daifuku (Japan), Murata Machinery (Japan), Atlas Copco (Sweden), Rorze Automation (Japan), and Ebara (Japan).

Research Coverage

The report segments the fab automation market and forecasts its size by offering, deployment type, wafer size, end user, and region. It also comprehensively reviews the drivers, restraints, opportunities, and challenges that influence market growth. The report encompasses both qualitative and 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 fab automation market and related segments. This report will help stakeholders understand the competitive landscape and gain valuable insights to strengthen their market position and develop effective go-to-market strategies. The report also helps stakeholders understand the pulse of the market, providing them with information on key market drivers, restraints, opportunities, and challenges.

The report provides insights into the following pointers:

- Analysis of key drivers (expansion of advanced-node and EUV-enabled manufacturing requiring high-throughput automation; rapid growth in 300 mm fab capacity; rising process complexity across logic, memory, and advanced packaging; increasing adoption of AI/ML-driven predictive analytics and digital-twin platforms; government incentives accelerating greenfield fab construction), restraints (high capital expenditure for automation hardware and integration; limited interoperability between legacy and next-generation systems; shortages of skilled automation and software specialists; extended equipment lead times due to vendor concentration), opportunities (deployment of advanced automation for 2.5D/3D packaging and heterogeneous integration; emergence of autonomous, AI-enabled fabs; large-scale automation demand from new fabs in the US, Asia, and Europe; adoption of modular AMHS and collaborative robotics; sustainability-focused automation solutions for energy and cleanroom efficiency), and challenges (stringent ultra-clean manufacturing requirements increasing contamination and reliability risks; integration complexity across multi-vendor MES, APC, YMS, and AMHS ecosystems; maintaining automation performance at high wafer volumes and EUV process sensitivities; geopolitical disruptions affecting semiconductor equipment supply chains; high complexity and cost of modernizing brownfield fabs without production impact)

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and strategies such as new product launches, expansions, contracts, partnerships, and acquisitions in the fab automation market

- Market Development: Comprehensive information about lucrative markets-the report analyses the fab automation market across varied regions

- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the fab automation market

- Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players, including Daifuku (Japan), Murata Machinery (Japan), Atlas Copco (Sweden), Rorze Automation (Japan), Ebara (Japan), FANUC (Japan), Kawasaki Heavy Industries (Japan), Hirata Corporation (Japan), Yaskawa (Japan), and KUKA AG (Germany).

Table of Contents:

1	INTRODUCTION	26
1.1	STUDY OBJECTIVES	26
1.2	MARKET DEFINITION	27
1.3	STUDY SCOPE	27
1.3.1	MARKETS COVERED AND REGIONAL SCOPE	27
1.3.2	YEARS CONSIDERED	28
1.3.3	INCLUSIONS AND EXCLUSIONS	28
1.4	CURRENCY CONSIDERED	29
1.5	UNITS CONSIDERED	29
1.6	STAKEHOLDERS	29

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2	EXECUTIVE SUMMARY	30
2.1	MARKET HIGHLIGHTS AND KEY INSIGHTS	30
2.2	KEY MARKET PARTICIPANTS: MAPPING OF STRATEGIC DEVELOPMENTS	32
2.3	DISRUPTIVE TRENDS IN FAB AUTOMATION MARKET	33
2.4	HIGH-GROWTH SEGMENTS	34
2.5	REGIONAL SNAPSHOT: MARKET SIZE, GROWTH RATE, AND FORECAST	35
3	PREMIUM INSIGHTS	36
3.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN FAB AUTOMATION MARKET	36
3.2	FAB AUTOMATION MARKET, BY OFFERING	37
3.3	FAB AUTOMATION MARKET, BY WAFER SIZE	37
3.4	FAB AUTOMATION MARKET, BY DEPLOYMENT TYPE	38
3.5	FAB AUTOMATION MARKET, BY END USER	38
3.6	FAB AUTOMATION MARKET, BY REGION	39
3.7	FAB AUTOMATION MARKET, BY COUNTRY	39
4	MARKET OVERVIEW	40
4.1	INTRODUCTION	40
4.2	MARKET DYNAMICS	41
4.2.1	DRIVERS	41
4.2.1.1	Rising demand for high-throughput, high-yield semiconductor manufacturing across AI, HPC, automotive, and 5G applications	41
4.2.1.2	Expansion of advanced-node fabs requiring deep automation to sustain process stability	42
4.2.1.3	Increasing adoption of AMHS, robotics, and contamination-free transport to reduce human intervention	43
4.2.1.4	Increasing integration of MES, APC, YMS, and ECS platforms to enhance real-time process control and production efficiency	43
4.2.1.5	Government-backed investments and incentive programs accelerating greenfield fabs and capacity expansion	44
4.2.2	RESTRAINTS	45
4.2.2.1	High capital investment requirements for full fab automation deployment, particularly in brownfield facilities	45
4.2.2.2	Interoperability challenges between legacy tools and modern automation systems	46
4.2.2.3	Limited availability of skilled automation engineers for system integration and fab-level optimization	46
4.2.2.4	Supply chain constraints for automation components and cleanroom systems, resulting in extended deployment timelines	47
4.2.3	OPPORTUNITIES	48
4.2.3.1	AI/ML-driven automation enabling predictive maintenance, intelligent scheduling, and yield enhancement	48
4.2.3.2	Rising automation demand in OSAT facilities driven by advanced packaging and throughput requirements	49
4.2.3.3	Expansion of 300 mm fabs and modernization of 200 mm facilities, driving long-term automation upgrade cycles	49
4.2.3.4	Growing adoption of digital twins and simulation platforms to optimize fab workflows and equipment layouts	50
4.2.4	CHALLENGES	51
4.2.4.1	Complex coordination and orchestration across multi-layer automation architectures in large semiconductor fabs	51
4.2.4.2	Ensuring real-time, low-latency communication across distributed automation networks under heavy data loads	52
4.2.4.3	Ensuring ultra-clean automated handling as device geometries shrink and contamination sensitivity intensifies	52
4.2.4.4	Long deployment and integration timelines create operational risks in upgrading automation within running fabs	53
4.3	INTERCONNECTED MARKETS AND CROSS-SECTOR OPPORTUNITIES	54
4.3.1	INTERCONNECTED MARKETS	54
4.3.2	CROSS-SECTOR OPPORTUNITIES	55
4.4	STRATEGIC MOVES BY TIER 1/2/3 PLAYERS	56
4.4.1	MARKET DYNAMICS	56
5	INDUSTRY TRENDS	57

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5.1	INTRODUCTION	57
5.2	PORTER'S FIVE FORCES ANALYSIS	57
5.2.1	THREAT OF NEW ENTRANTS	58
5.2.2	THREAT OF SUBSTITUTES	58
5.2.3	BARGAINING POWER OF SUPPLIERS	59
5.2.4	BARGAINING POWER OF BUYERS	59
5.2.5	INTENSITY OF COMPETITIVE RIVALRY	59
	?	
5.3	MACROECONOMIC INDICATORS	59
5.3.1	INTRODUCTION	59
5.3.2	GDP TRENDS AND FORECAST	59
5.3.3	TRENDS IN MANUFACTURING & INDUSTRIAL AUTOMATION INDUSTRY	61
5.3.4	TRENDS IN SEMICONDUCTOR MANUFACTURING INDUSTRY	62
5.4	VALUE CHAIN ANALYSIS	62
5.5	ECOSYSTEM ANALYSIS	64
5.6	PRICING ANALYSIS	66
5.6.1	AVERAGE SELLING PRICE OF KEY PLAYERS, BY OFFERING, 2024	66
5.6.2	AVERAGE SELLING PRICE, BY REGION, 2021-2024	67
5.7	TRADE ANALYSIS	68
5.7.1	IMPORT SCENARIO (HS CODE 8479)	68
5.7.2	EXPORT SCENARIO (HS CODE 8479)	69
5.8	KEY CONFERENCES AND EVENTS, 2026-2027	71
5.9	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESSES	71
5.10	INVESTMENT AND FUNDING SCENARIO, 2021-2025	72
5.11	CASE STUDY ANALYSIS	73
5.11.1	TSMC'S CLEANROOM THROUGHPUT IMPROVEMENT WITH DAIFUKU'S NEO-AMHS PLATFORM	73
5.11.2	SAMSUNG ELECTRONICS' AUTOMATION UPGRADE USING MURATA MACHINERY'S WAFER-HANDLING ROBOTICS	73
5.11.3	GLOBALFOUNDRIES' APC/YMS TRANSFORMATION WITH APPLIED MATERIALS AUTOMATION SOFTWARE SOLUTIONS	74
5.12	IMPACT OF 2025 US TARIFF - FAB AUTOMATION MARKET	74
5.12.1	KEY TARIFF RATES	75
5.12.2	PRICE IMPACT ANALYSIS	76
5.12.3	IMPACT ON COUNTRIES/REGIONS	76
5.12.3.1	US	76
5.12.3.2	Europe	77
5.12.3.3	Asia Pacific	77
5.12.4	IMPACT ON END USERS	77
6	TECHNOLOGICAL ADVANCEMENTS, AI-DRIVEN IMPACT, PATENTS, INNOVATIONS, AND FUTURE APPLICATIONS	80
6.1	KEY EMERGING TECHNOLOGIES	80
6.1.1	AI-DRIVEN ADVANCED PROCESS CONTROL (APC) & PREDICTIVE AUTOMATION	80
6.1.2	MODULAR & COLLABORATIVE AMHS PLATFORMS	80
6.1.3	DIGITAL TWIN & VIRTUAL FAB SIMULATION PLATFORMS	80
6.2	COMPLEMENTARY TECHNOLOGIES	81
6.2.1	EDGE COMPUTING & REAL-TIME DATA INFRASTRUCTURE	81
6.2.2	HIGH-PRECISION CLEANROOM ENVIRONMENTAL CONTROL & MONITORING SYSTEMS	81
6.2.3	SECURE FAB COMMUNICATION NETWORKS & INDUSTRIAL IOT CONNECTIVITY	81

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- 6.3 ADJACENT TECHNOLOGIES 82
 - 6.3.1 ADVANCED PACKAGING & HETEROGENEOUS INTEGRATION AUTOMATION 82
 - 6.3.2 SEMICONDUCTOR MATERIALS DELIVERY & CHEMICAL MANAGEMENT SYSTEMS 82
- 6.4 TECHNOLOGY/PRODUCT ROADMAP 82
 - 6.4.1 SHORT-TERM (2025-2027): AUTOMATION MODERNIZATION & AI-AUGMENTED OPERATIONS 82
 - 6.4.2 MID-TERM (2027-2030): HYPER-AUTOMATION & ADVANCED PACKAGING INTEGRATION 83
 - 6.4.3 LONG-TERM (2030-2035+): AUTONOMOUS FABs & SYSTEM-LEVEL CONVERGENCE 84
- 6.5 PATENT ANALYSIS 84
- 6.6 IMPACT OF AI ON FAB AUTOMATION MARKET 87
 - 6.6.1 TOP USE CASES AND MARKET POTENTIAL 87
 - 6.6.2 BEST PRACTICES IN FAB AUTOMATION MARKET 88
 - 6.6.3 CASE STUDIES OF AI IMPLEMENTATION IN FAB AUTOMATION MARKET 89
 - 6.6.4 INTERCONNECTED ADJACENT ECOSYSTEM AND IMPACT ON MARKET PLAYERS 89
 - 6.6.5 CLIENTS' READINESS TO ADOPT GENERATIVE AI IN FAB AUTOMATION MARKET 90
- 7 REGULATORY LANDSCAPE 92
 - 7.1 INTRODUCTION 92
 - 7.1.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 92
 - 7.2 INDUSTRY STANDARDS 94
 - 7.2.1 SEMI STANDARDS (GEM, GEM300, E84, E87, EDA/INTERFACE A) 94
 - 7.2.2 ISO CLEANROOM & ENVIRONMENTAL CONTROL STANDARDS (ISO 14644 SERIES) 95
 - 7.2.3 ISO 10218 & IEC 61508 - ROBOTICS SAFETY & FUNCTIONAL SAFETY STANDARDS 95
 - 7.2.4 OPC UA FOR FAB EQUIPMENT COMMUNICATION 95
 - 7.2.5 ANSI/ISA-95 - MANUFACTURING INTEGRATION STANDARD 95
 - 7.2.6 SEMI S2 - ENVIRONMENTAL, HEALTH & SAFETY (EHS) STANDARD 96
- 8 CUSTOMER LANDSCAPE AND BUYER BEHAVIOR 97
 - 8.1 DECISION-MAKING PROCESS 97
 - 8.2 KEY STAKEHOLDERS AND BUYING CRITERIA 98
 - 8.2.1 KEY STAKEHOLDERS IN BUYING PROCESS 99
 - 8.2.2 BUYING CRITERIA 99
 - 8.3 ADOPTION BARRIERS AND INTERNAL CHALLENGES 100
 - 8.4 UNMET NEEDS FROM VARIOUS END USERS 101
- 9 FAB AUTOMATION MARKET, BY OFFERING 103
 - 9.1 INTRODUCTION 104
 - 9.2 HARDWARE 105
 - 9.2.1 AUTOMATED MATERIAL HANDLING SYSTEMS 108
 - 9.2.1.1 AI-orchestrated throughput growth to fuel AMHS demand in fab automation 108
 - 9.2.2 ROBOTICS & HANDLING EQUIPMENT 111
 - 9.2.2.1 AI-enabled precision and vision integration to drive demand 111
 - 9.2.3 ENVIRONMENTAL CONTROL SYSTEMS 115
 - 9.2.3.1 Humidity and AMC control to increase demand for advanced environmental control systems 115
 - 9.2.4 POWER & UTILITY AUTOMATION SYSTEMS 118
 - 9.2.4.1 Power quality and energy-efficiency mandates to accelerate adoption of utility & power automation systems in fabs 118
 - 9.2.5 COMMUNICATION & NETWORKING HARDWARE 121
 - 9.2.5.1 Low-latency, deterministic connectivity requirements to drive market 121
 - 9.3 SOFTWARE 123

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- 9.3.1 MANUFACTURING EXECUTION SYSTEMS 126
 - 9.3.1.1 Model-driven traceability and real-time dispatch to accelerate adoption 126
- 9.3.2 EQUIPMENT CONTROL SOFTWARE 127
 - 9.3.2.1 Real-time tool-state coordination and recipe enforcement to drive adoption 127
- 9.3.3 ADVANCED PROCESS CONTROL 127
 - 9.3.3.1 Shrinking process windows and high-mix production to drive APC integration 127
- 9.3.4 YIELD MANAGEMENT SOFTWARE 128
 - 9.3.4.1 Defect density reduction and multi-source data fusion to increase adoption 128
- 9.3.5 AI/ML & PREDICTIVE ANALYTICS PLATFORMS 128
 - 9.3.5.1 Predictive maintenance and lot-flow optimization to accelerate AI/ML deployment 128
- 9.3.6 SIMULATION & DIGITAL TWIN SOFTWARE 128
 - 9.3.6.1 Capacity planning and virtual process optimization to expand digital twin usage 128
- 9.3.7 MIDDLEWARE & COMMUNICATION PROTOCOL SOFTWARE 129
 - 9.3.7.1 Interoperability requirements and multi-vendor tool integration to fuel middleware adoption 129
- 9.4 SERVICES 129
 - 9.4.1 PROFESSIONAL SERVICES 132
 - 9.4.1.1 System integration complexity and node migration timelines to increase demand 132
 - 9.4.2 MANAGED SERVICES 132
 - 9.4.2.1 Predictive maintenance and 24/7 operational assurance to accelerate managed services adoption 132
- 10 FAB AUTOMATION MARKET, BY AUTOMATION LAYER 134
 - 10.1 INTRODUCTION 134
 - 10.2 MATERIAL HANDLING AUTOMATION 134
 - 10.3 EQUIPMENT AUTOMATION 134
 - 10.4 PROCESS AUTOMATION 135
 - 10.5 FACTORY AUTOMATION SOFTWARE 136
 - 10.6 AI/ANALYTICS AUTOMATION 136
- 11 FAB AUTOMATION MARKET, BY WAFER SIZE 138
 - 11.1 INTRODUCTION 139
 - 11.2 <150 MM 140
 - 11.2.1 INCREASED SPECIALTY-DEVICE PRODUCTION TO DRIVE ADOPTION 140
 - 11.3 200 MM 140
 - 11.3.1 GROWTH IN POWER AND ANALOG DEVICES TO INCREASE DEMAND 140
 - 11.4 300 MM 141
 - 11.4.1 ADVANCED PACKAGING DEMAND AND HIGH-VOLUME TEST REQUIREMENTS TO DRIVE MARKET 141
- 12 FAB AUTOMATION MARKET, BY DEPLOYMENT TYPE 142
 - 12.1 INTRODUCTION 143
 - 12.2 GREENFIELD FABS 144
 - 12.2.1 ADVANCED NODE CAPACITY EXPANSION AND HIGH-THROUGHPUT MANUFACTURING REQUIREMENTS TO DRIVE MARKET 144
 - 12.3 BROWNFIELD FABS 144
 - 12.3.1 RETROFIT INVESTMENTS AND LEGACY-ASSET UTILIZATION TO SUPPORT MARKET GROWTH 144
- 13 FAB AUTOMATION MARKET, BY FAB TYPE 146
 - 13.1 INTRODUCTION 146
 - 13.2 ADVANCED NODE FABS (?7 NM) 146
 - 13.3 MAINSTREAM NODE FABS (10-28 NM) 147
 - 13.4 MATURE NODE FABS (28-90 NM) 147

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13.5	LEGACY NODE FABS (>90 NM)	148
14	FAB AUTOMATION MARKET, BY AUTOMATION LEVEL	149
14.1	INTRODUCTION	149
14.2	FULLY AUTOMATED	149
14.3	SEMI-AUTOMATED	149
	?	
15	FAB AUTOMATION MARKET, BY END USER	151
15.1	INTRODUCTION	152
15.2	INTEGRATED DEVICE MANUFACTURERS	153
15.2.1	COMPLEX PRODUCT PORTFOLIOS AND MULTI-FAB MANUFACTURING COORDINATION TO DRIVE MARKET	153
15.3	FOUNDRIES	154
15.3.1	HIGH-MIX PRODUCTION LOADS AND ADVANCED-NODE CAPACITY REQUIREMENTS TO PROPEL MARKET	154
15.4	OUTSOURCED SEMICONDUCTOR ASSEMBLY & TEST PROVIDERS	155
15.4.1	ADVANCED PACKAGING DEMAND AND HIGH-VOLUME TEST REQUIREMENTS TO DRIVE MARKET	155
15.5	RESEARCH FABs	157
15.5.1	HIGH-ACCURACY EXPERIMENTATION AND ACCELERATED PROTOTYPING DEMAND TO DRIVE MARKET	157
16	FAB AUTOMATION MARKET, BY REGION	159
16.1	INTRODUCTION	160
16.2	AMERICAS	161
16.2.1	US	164
16.2.1.1	Federal incentives and advanced-node capacity expansion to drive adoption	164
16.2.2	REST OF AMERICAS	166
16.3	ASIA PACIFIC	168
16.3.1	CHINA	172
16.3.1.1	China's 300 mm expansion and localized automation ecosystem to drive market	172
16.3.2	JAPAN	174
16.3.2.1	Government subsidies and new 300 mm fab investments to accelerate demand	174
16.3.3	SOUTH KOREA	176
16.3.3.1	Memory-led capacity expansion and mega-cluster investments to accelerate demand	176
16.3.4	TAIWAN	178
16.3.4.1	Advanced-node expansion and foundry-led manufacturing growth to drive automation	178
16.3.5	INDIA	180
16.3.5.1	Government-backed fab expansion and growing domestic demand to drive adoption	180
16.3.6	REST OF ASIA PACIFIC	181
16.4	EMEA	183
16.4.1	EUROPE	185
16.4.1.1	Advanced-node investments and power-semiconductor expansion to drive market	185
	?	
16.4.2	MIDDLE EAST & AFRICA	187
16.4.2.1	Government-led technology initiatives and emerging electronics manufacturing to support market growth	187
17	COMPETITIVE LANDSCAPE	190
17.1	OVERVIEW	190
17.2	KEY PLAYER STRATEGIES/RIGHT TO WIN, JANUARY 2021-OCTOBER 2025	190
17.3	MARKET SHARE ANALYSIS, 2024	191

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17.4	REVENUE ANALYSIS, 2021-2024	193
17.5	COMPANY VALUATION AND FINANCIAL METRICS	194
17.6	BRAND/PRODUCT COMPARISON	195
17.7	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	196
17.7.1	STARS	196
17.7.2	EMERGING LEADERS	196
17.7.3	PERVASIVE PLAYERS	196
17.7.4	PARTICIPANTS	196
17.7.5	COMPANY FOOTPRINT: KEY PLAYERS, 2024	198
17.7.5.1	Company footprint	198
17.7.5.2	Region footprint	199
17.7.5.3	Offering footprint	199
17.7.5.4	Wafer size footprint	200
17.7.5.5	Deployment type footprint	201
17.7.5.6	End user footprint	202
17.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	203
17.8.1	PROGRESSIVE COMPANIES	203
17.8.2	RESPONSIVE COMPANIES	203
17.8.3	DYNAMIC COMPANIES	203
17.8.4	STARTING BLOCKS	203
17.8.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024	205
17.8.5.1	Detailed list of key startups/SMEs	205
17.8.5.2	Competitive benchmarking of key startups/SMEs	206
17.9	COMPETITIVE SCENARIO	207
17.9.1	PRODUCT LAUNCHES	207
17.9.2	EXPANSIONS	208
18	COMPANY PROFILES	209
18.1	INTRODUCTION	209
18.2	KEY PLAYERS	209
18.2.1	DAIFUKU CO., LTD.	209
18.2.1.1	Business overview	209
18.2.1.2	Products/Solutions/Services offered	210
18.2.1.3	Recent developments	211
18.2.1.3.1	Expansions	211
18.2.1.4	MnM view	212
18.2.1.4.1	Key strengths	212
18.2.1.4.2	Strategic choices	212
18.2.1.4.3	Weaknesses and competitive threats	213
18.2.2	MURATA MACHINERY	213
18.2.2.1	Business overview	213
18.2.2.2	Products/Solutions/Services offered	213
18.2.2.3	MnM view	214
18.2.2.3.1	Key strengths	214
18.2.2.3.2	Strategic choices	214
18.2.2.3.3	Weaknesses and competitive threats	215
18.2.3	EBARA CORPORATION	216
18.2.3.1	Business overview	216

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- 18.2.3.2 Products/Solutions/Services offered 217
- 18.2.3.3 MnM view 217
 - 18.2.3.3.1 Key strengths 217
 - 18.2.3.3.2 Strategic choices 217
 - 18.2.3.3.3 Weaknesses and competitive threats 218
- 18.2.4 RORZE CORPORATION 219
 - 18.2.4.1 Business overview 219
 - 18.2.4.2 Products/Solutions/Services offered 219
 - 18.2.4.3 MnM view 220
 - 18.2.4.3.1 Key strengths 220
 - 18.2.4.3.2 Strategic choices 220
 - 18.2.4.3.3 Weaknesses and competitive threats 220
- 18.2.5 FANUC 221
 - 18.2.5.1 Business overview 221
 - 18.2.5.2 Products/Solutions/Services offered 222
 - 18.2.5.3 MnM view 222
 - 18.2.5.3.1 Key strengths 222
 - 18.2.5.3.2 Strategic choices 222
 - 18.2.5.3.3 Weaknesses and competitive threats 223
- 18.2.6 HIRATA CORPORATION 224
 - 18.2.6.1 Business overview 224
 - 18.2.6.2 Products/Solutions/Services offered 225
- 18.2.7 KUKA AG 226
 - 18.2.7.1 Business overview 226
 - 18.2.7.2 Products/Solutions/Services offered 226
- 18.2.8 YASKAWA ELECTRIC CORPORATION 227
 - 18.2.8.1 Business overview 227
 - 18.2.8.2 Products/Solutions/Services offered 228
- 18.2.9 KAWASAKI HEAVY INDUSTRIES 229
 - 18.2.9.1 Business overview 229
 - 18.2.9.2 Products/Solutions/Services offered 230
- 18.3 OTHER PLAYERS 231
 - 18.3.1 ATLAS COPCO 231
 - 18.3.2 THIRA-UTECH 232
 - 18.3.3 DAIHEN CORPORATION 233
 - 18.3.4 BROOKS AUTOMATION 234
 - 18.3.5 MIRLE AUTOMATION 235
 - 18.3.6 SYNUS TECH 236
 - 18.3.7 SHINKO ELECTRIC INDUSTRIES 237
 - 18.3.8 MEETFUTURE 238
 - 18.3.9 FABMATICS 239
 - 18.3.10 TAIYO INC. 240
 - 18.3.11 SINEVA 241
 - 18.3.12 CASTEC INTERNATIONAL 242
 - 18.3.13 SYSTEMA GMBH 243
 - 18.3.14 KYOWA ELECTRIC & INSTRUMENT 244
 - 18.3.15 AMHS TECHNOLOGIES 245

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18.3.16	ATS AUTOMATION	246
18.3.17	NIDEC CORPORATION	247
18.3.18	GENMARK AUTOMATION	248
18.3.19	JEL CORPORATION	249
18.3.20	KENSINGTON LABS	250
18.3.21	SIEMENS	251
18.3.22	ROCKWELL AUTOMATION	252
18.4	END USERS	253
18.4.1	FOUNDRIES	253
18.4.1.1	Taiwan Semiconductor Manufacturing Company Limited	253
18.4.1.2	Samsung	254
18.4.1.3	GlobalFoundries	255
18.4.1.4	SMIC	256
18.4.1.5	United Microelectronics Corporation	257
18.4.2	IDM FIRMS	258
18.4.2.1	Intel Corporation	258
18.4.2.2	Texas Instruments Incorporated	259
18.4.2.3	Infineon Technologies AG	260
18.4.3	OSAT COMPANIES	261
18.4.3.1	ASE Technology Holding Co., Ltd.	261
18.4.3.2	Amkor Technology	262
	?	
19	RESEARCH METHODOLOGY	263
19.1	RESEARCH DATA	263
19.1.1	SECONDARY AND PRIMARY RESEARCH	265
19.1.2	SECONDARY DATA	266
19.1.2.1	List of key secondary sources	266
19.1.2.2	Key data from secondary sources	267
19.1.3	PRIMARY DATA	267
19.1.3.1	List of primary interview participants	268
19.1.3.2	Breakdown of primaries	269
19.1.3.3	Key data from primary sources	269
19.1.3.4	Key industry insights	270
19.2	MARKET SIZE ESTIMATION	270
19.2.1	BOTTOM-UP APPROACH	270
19.2.2	TOP-DOWN APPROACH	271
19.3	DATA TRIANGULATION	272
19.4	RESEARCH ASSUMPTIONS	274
19.5	RESEARCH LIMITATIONS AND RISK ASSESSMENT	275
20	APPENDIX	276
20.1	INSIGHTS FROM INDUSTRY EXPERTS	276
20.2	DISCUSSION GUIDE	276
20.3	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	279
20.4	CUSTOMIZATION OPTIONS	281
20.5	RELATED REPORTS	281
20.6	AUTHOR DETAILS	282

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