

INDUSTRY OVERVIEW

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SOURCE OF INDUSTRY INFORMATION

We have engaged Frost & Sullivan, an independent market research consultant, to conduct a detailed analysis on Global and China’s industrial robot market, Global and China’s high-speed industrial robot market and prepare a report for use in this document, for which we have agreed to pay an engagement fee of RMB600,000, which we believe to be consistent with market rates.

In compiling and preparing the Frost & Sullivan Report, Frost & Sullivan adopted the following assumptions: (i) global social, economic and political environment is likely to remain stable in the period of 2026 to 2030 (the “forecast period”); (ii) purchasing power is expected to continue to rise moderately in emerging regions and to grow steadily in developed regions; and (iii) related industry key drivers are likely to drive the market in the forecast period.

Except as otherwise noted, all of the data and forecasts contained in this section are derived from the Frost & Sullivan Report. Frost & Sullivan has prepared the Frost & Sullivan Report based on detailed primary research which involved discussing the status of the Global and China’s industrial robot market and Global and China’s high-speed industrial robot market with certain leading industry participants and secondary research which involved reviewing company reports, independent research reports and data based on its own research database. Our Directors confirm that, after taking reasonable care, there has been no material adverse change in the overall market information since the date of the Frost & Sullivan Report that would materially qualify, contradict or have an impact on such information.

OVERVIEW OF GLOBAL INDUSTRIAL ROBOT MARKET

Definition and Classification

Industrial Robot refers to automatically controlled, reprogrammable mechanical device with multi-degree-of-freedom manipulation capabilities, which can be either fixed in place or fixed to a mobile platform for use in automation applications in an industrial environment.

By mechanical structure, industrial robots can be primarily categorised into (i) articulated robots, (ii) SCARA robots, (iii) parallel robots, and (iv) collaborative robots (“cobots”).

- **Articulated Robot** is constructed with at least three rotary joints connected in series. With a structure that imitates a human arm, articulated robot can perform intricate trajectory motions in three-dimensional space.

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- **SCARA Robot** (Selective Compliance Assembly Robot Arm) is characterised by two parallel rotary joints to achieve precise positioning in the horizontal plane and typically a linear joint in the vertical direction for Z-axis movement. Its mechanical structure features selective compliance in the horizontal plane, enabling adaptive compensation for minor positional errors in the XY-axis direction, while maintaining high rigidity in the vertical direction.
- **Parallel Robot** is based on parallel kinematic mechanisms, in which the end-effector is driven simultaneously by multiple independent kinematic chains forming closed-loop structures. This design achieves precise control of end-effector position and orientation through coordinated parallel motion, providing advantages including high stiffness and dynamic response.
- **Collaborative Robot**, commonly known as “Cobot”, is a type of industrial robot capable of working safely and in close proximity to humans within a shared workspace. Unlike traditional industrial robots, which are typically isolated behind safety fences and perform tasks independently, cobots employ advanced safety technologies — such as force feedback, collision detection and speed limitation — to ensure safety during human interaction.

Within the industrial robotics industry, high-speed industrial robots have evolved into a widely recognised market segment. Industry participants generally identify and define high-speed industrial robots based on motion cycle time as a key performance indicator. Such classification methodology has been broadly adopted across the industry value chain, including robot manufacturers, system integrators and end customers. From an industry development perspective, the emergence of this segment is not merely attributable to differences in technological routes, but is also driven by downstream application requirements for increasingly stringent production takt time, throughput and overall manufacturing efficiency. Against this backdrop, high-speed industrial robots have established mature and representative applications in production processes with demanding cycle-time requirements.

Classified by the core performance metric of motion cycle time, the domain of high-speed industrial robotics is primarily defined by two mechanical structures: parallel robots and SCARA robots. These two structures are particularly suitable for high-speed development due to their inherent kinematic and structural characteristics as following.

- **Parallel robots** feature multiple kinematic chains operating simultaneously to control the end effector. This design results in low moving mass, high stiffness, and an excellent dynamic response, making them exceptionally well-suited for ultra-high-speed pick-and-place and other demanding high-cycle rate applications.

The parallel architecture is inherently designed for high-speed operation; therefore, all parallel robots are classified as high-speed industrial robots.

- **SCARA robots** employ a rigid vertical axis combined with compliant horizontal motion, enabling fast planar movement with high repeatability, which makes them highly effective in short-cycle assembly and handling tasks.

Importantly, not all SCARA robots are categorised as high-speed. In the context of high-speed applications, this classification generally applies to models specifically engineered to achieve a cycle time of 0.4 seconds or less.

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In contrast, articulated robots and cobots are not typically defined by high motion cycle rates as a core characteristic. The design of these robot types prioritises different performance dimensions.

- Articulated robots offer advantages in higher payload capacity and full spatial operational flexibility, making them suitable for complex, multi-axis tasks across a wide working range.
- Cobots further place “human-robot collaboration safety” as the foremost design priority. This inherent safety requirement objectively limits their maximum operating speed.

The core value of these two robot types lies in their exceptional task versatility and ease of integration in human-robot shared environments. Therefore, articulated robots and cobots are not systematically classified within the high-speed industrial robot category at the current stage of industrial application.

Looking forward, the speed performance of both articulated and cobots is expected to improve as enabling technologies continue to evolve. Advances in high-precision motion control, real-time sensing, AI-based perception, adaptive safety systems, and control algorithms are gradually reducing the traditional trade-offs between speed, safety, and flexibility. As a result, high-speed capability is expected to become an emerging performance dimension within selected segments of these robot categories, reflecting a structural convergence between traditional flexible architectures and high-throughput industrial automation demands.

Value Chain Analysis of Industrial Robot Market

The industrial robot market is a highly interdisciplinary and technology-intensive sector. The value chain of the industrial robot market can be systematically divided into three core segments.

- ***Up-stream: Suppliers of Basic Materials & Core Components & Software***

The upstream of the industry chain forms the technological and resource base of the industrial robot industry. Its development directly shapes the performance limits and cost structure of robot hardware.

Raw materials include structural materials and key functional materials, covering alloys and carbon fibre composites, rare-earth permanent magnets, semiconductor materials and seals and coating materials. Core components include electronic hardware, controllers, reducers, sensors, actuators and drive systems, providing the foundation for robot motion and perception.

Upstream suppliers also provide foundational software and technologies, including real-time operating systems, simulation tools, industrial communication frameworks, human-machine interfaces (HMI), and libraries of algorithms, which support secondary development and application integration.

- ***Mid-stream: Industrial Robot Manufacturers & System Integrators***

The midstream segment of the industrial robot value chain serves as the key link between upstream core components and downstream applications, and mainly comprises robot body manufacturers and system integrators.

Robot body manufacturers occupy a central position, integrating upstream inputs to carry out the R&D, manufacturing, and iteration of standardised robot platforms. Their core functions include the design of mechanical structures, the development of highly coupled control systems, the implementation of motion control and vision algorithms, and the construction of standardised

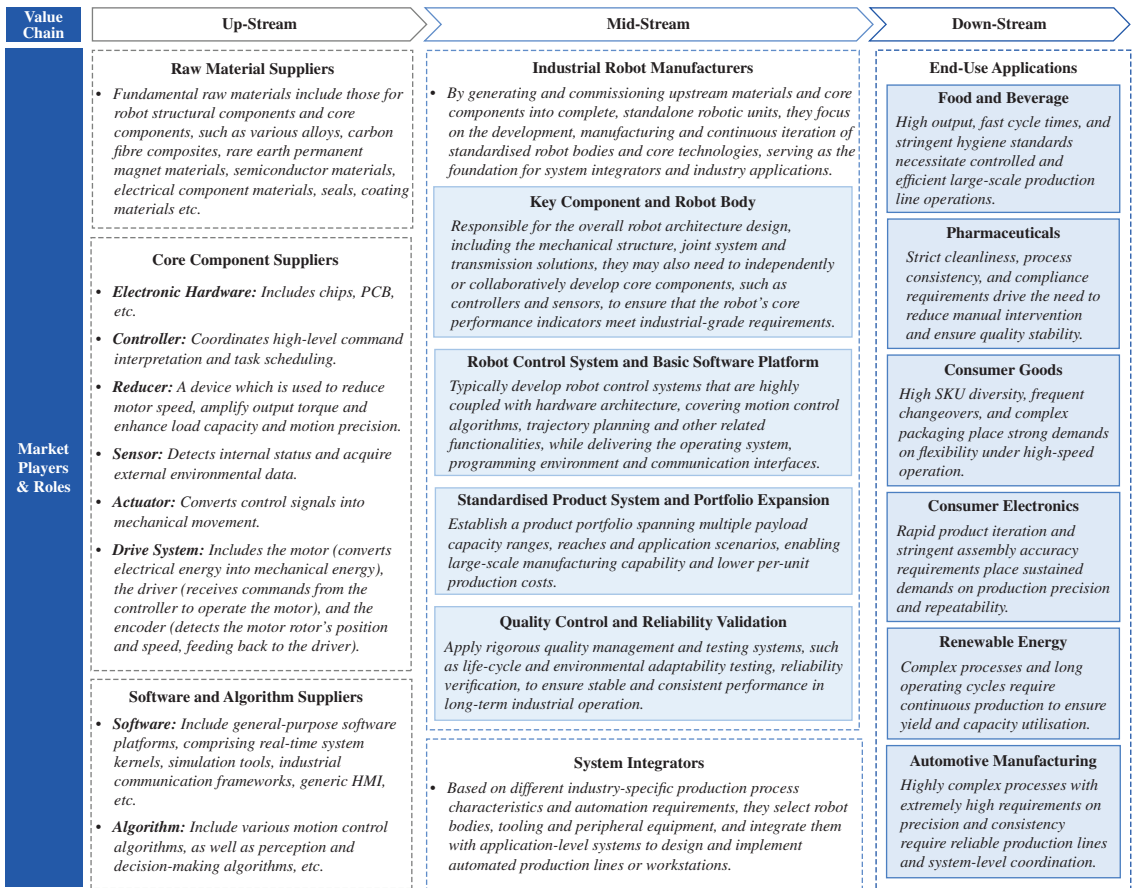
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product portfolios across multiple payloads and application scenarios. To ensure overall performance and system compatibility, body manufacturers often develop core components in-house or collaborate closely with upstream suppliers to optimise hardware-software integration and overall performance.

System integrators, in addition, operate close to end-user industries and are responsible for application-level integration and solution deployment based on the production processes and automation requirements of different sectors.

- **Down-stream: End-use Applications**

Downstream end-use applications of industrial robots primarily span consumer goods, food and beverage, pharmaceutical, consumer electronics, renewable energy and automotive manufacturing. Owing to differences in production characteristics, these industries impose differentiated requirements on robot systems, and drive technological iteration and overall industry development across the value chain.



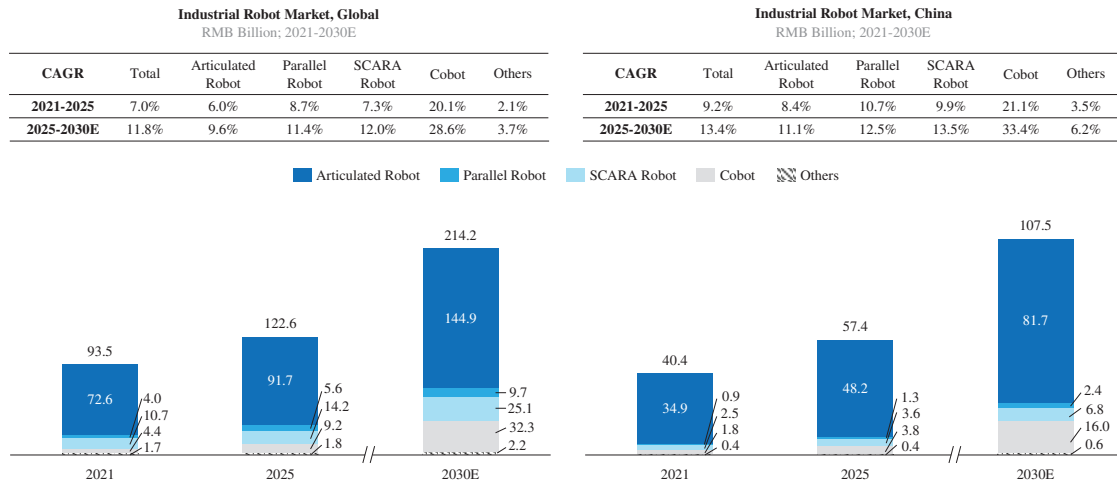
Source: Frost & Sullivan Analysis

Global and China's Industrial Robot Market

Industrial robot is the cornerstone of advanced manufacturing, enabling production systems to evolve toward higher levels of intelligence, automation and flexibility. Against the backdrop of the sustained advancement of intelligent manufacturing and structurally rising labour costs in the manufacturing sector, industrial robots have increasingly been adopted as critical automation equipment to replace repetitive, labour-intensive and hazardous tasks, thereby supporting

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improvements in production efficiency, process stability and product quality. In 2021, both the global and China’s industrial robot markets experienced a pronounced surge, with year-on-year growth in shipment values reaching approximately 25.5% and 28.5%, respectively. This rapid expansion was primarily driven by the explosive growth of downstream demands, most notably the new energy vehicle (NEV) sector. In the same year, global and China’s NEV sales volume increased by approximately 102.4% and 157.6% year on year, significantly accelerating capital investment and capacity expansion in vehicle manufacturing and power battery production, and in turn stimulating a concentrated release of demand for industrial robots across key manufacturing processes.



Source: Frost & Sullivan Analysis and Estimates

Note: The market size refers to the total shipment value of industrial robots.

From 2021 to 2025, both global and China’s industrial robot shipment values exhibited a clear upward trajectory, increasing from approximately RMB93.5 billion and RMB40.4 billion to approximately RMB122.6 billion and RMB57.4 billion, with CAGRs being approximately 7.0% and 9.2%, respectively. Over the same period, China’s share of the global industrial robot shipment value increased from roughly 43.2% to 46.8%, reflecting its strengthening position in the global industrial robot market.

Looking ahead, the industrial robot market is expected to maintain steady growth, supported by the continued advancement of intelligent manufacturing, rising labour costs and accelerating industrial automation. By 2030, the global industrial robot shipment value is forecast to reach approximately RMB214.2 billion, while China’s shipment value is expected to reach approximately RMB107.5 billion, maintaining its position as the world’s largest industrial robot market.

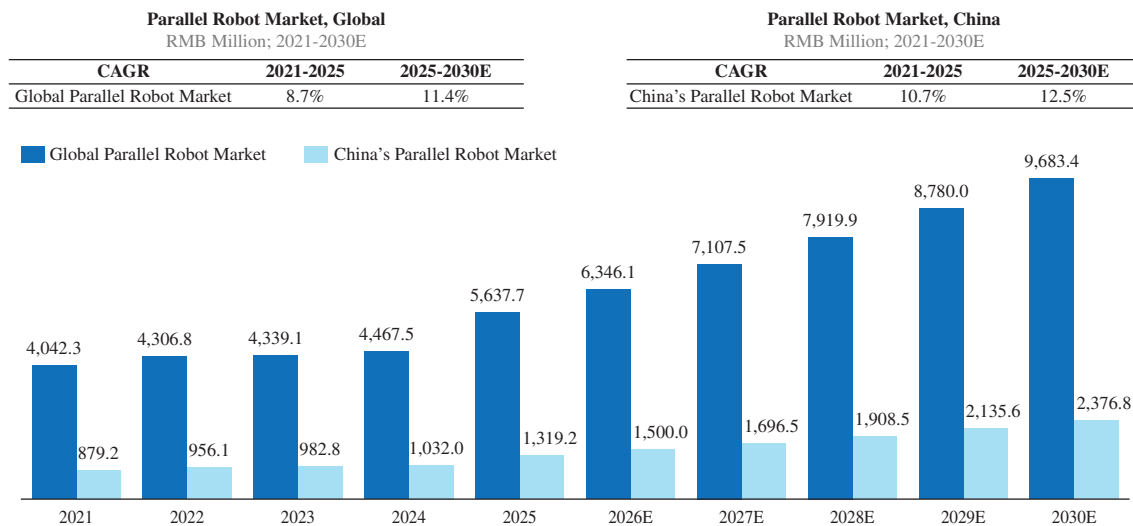
Global and China’s Parallel Robot Market

The growth of the parallel robot market stems from its irreplaceable performance advantages in specific high-demand scenarios. Unlike versatile industrial robots, parallel robots excel in processes requiring extreme speed, precision, and dynamic stability, such as high-throughput sorting, rapid assembly, and high-speed packaging. These are often production bottlenecks where traditional solutions struggle to balance efficiency and reliability. From 2021 to 2025, the global and China’s parallel robot shipment values increased from approximately RMB4,042.3 million and RMB879.2 million to approximately RMB5,637.7 million and RMB1,319.2 million, respectively.

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From a growth perspective, the parallel robot market is supported by both deeper penetration in established applications and expansion into emerging scenarios. In mature sectors such as food & beverage and pharmaceuticals, adoption continues to increase, supporting larger-scale deployment. Meanwhile, improvements in core components and system control capabilities are enabling broader adoption in emerging applications, including consumer electronics micro-assembly and semiconductor back-end processes. As downstream manufacturers continue to pursue higher production efficiency, precision and process consistency, parallel robots are becoming increasingly critical to production capacity and manufacturing performance, strengthening both their market position and demand certainty.

By 2030, the global parallel robot shipment value is expected to reach approximately RMB9,683.4 million, while China’s shipment value is projected to reach approximately RMB2,376.8 million, representing a CAGR of approximately 12.5% from 2025 to 2030, outpacing the global market.



Source: Frost & Sullivan Analysis and Estimates

Note: The market size refers to the total shipment value of parallel robots.

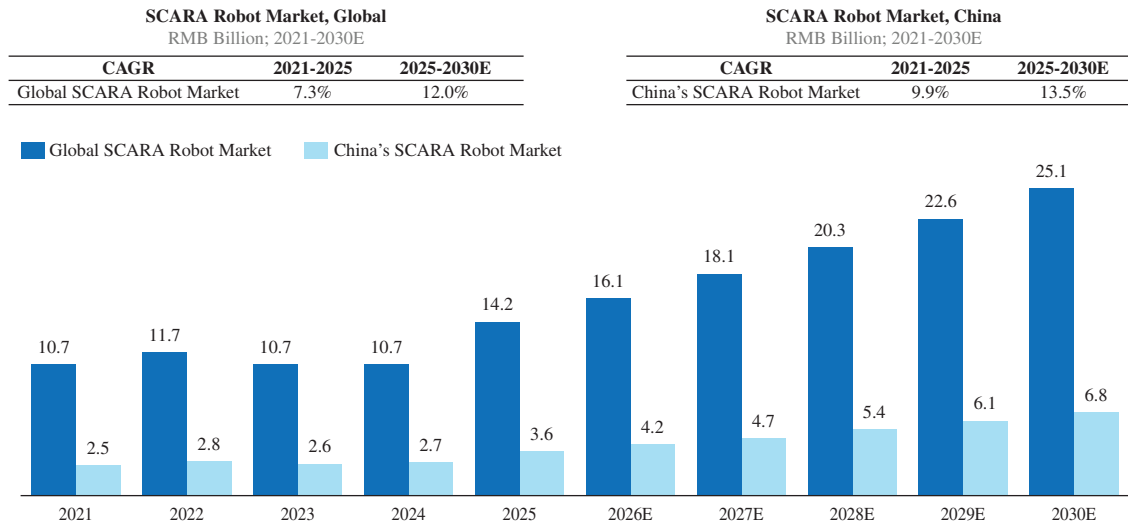
Global and China’s SCARA Robot Market

SCARA robots’ horizontal flexibility and vertical rigidity make them ideal for precision assembly, material handling, and positioning inspection. Demand is mainly driven by key downstream sectors such as consumer electronics and renewable energy, where higher precision requirements and expanding battery production support applications including automated assembly, high-speed dispensing, cell sorting, module assembly, and PACK. As global capacity and supply chains concentrate in China, China’s SCARA market growth has become closely tied to these strategic industries.

Between 2021 and 2025, the SCARA robot market experienced fluctuations driven primarily by cyclical demand in the consumer electronics industry, which is the largest application sector for SCARA robots. Despite this, the global and China’s markets grew from approximately RMB10.7 billion and RMB2.5 billion in 2021 to approximately RMB14.2 billion and RMB3.6 billion in 2025, representing CAGRs of approximately 7.3% and 9.9%, respectively. China’s stronger growth reflects its leading position in global manufacturing and supply chains, as well as the continued demand for SCARA robots in high-frequency, standardised production processes.

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Looking ahead, accelerated product innovation, deeper AI integration, and the expansion of emerging devices such as wearable devices are expected to support a steady recovery in the consumer electronics industry. As a result, SCARA robots are expected to maintain strong penetration potential across industries and applications. The global and China’s SCARA robot shipment values are projected to grow at CAGRs of approximately 12.0% and 13.5%, reaching approximately RMB25.1 billion and RMB6.8 billion by 2030, respectively.



Source: Frost & Sullivan Analysis and Estimates

Note: The market size refers to the total shipment value of SCARA robots.

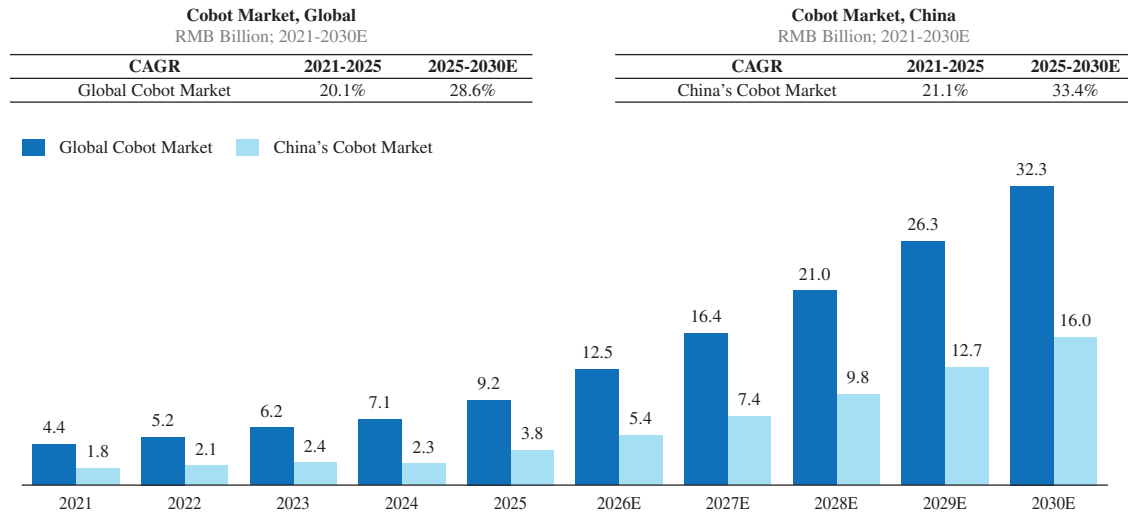
Global and China’s Cobot Market

Cobots, as a key development direction in industrial automation, derive their core technological value from the ability to work safely alongside humans in shared spaces. Compared with traditional industrial robots, cobots offer significant advantages in safety, ease of deployment, and operational flexibility, filling the application gap between conventional industrial robots and purely manual operations. Between 2021 and 2025, the global and China’s cobot shipment values grew from approximately RMB4.4 billion and RMB1.8 billion to approximately RMB9.2 billion and RMB3.8 billion, representing CAGRs of approximately 20.1% and 21.1%, respectively.

Market demand is expanding from material handling and loading/unloading to higher-value applications such as precision assembly, inspection, and packaging, particularly in small-batch, mixed-production environments. At the same time, modular design, open interfaces, and AI-enabled vision and force control are improving deployment efficiency and task capabilities, accelerating adoption from isolated applications toward full production line integration.

Looking ahead, the global and China’s cobot shipment values are projected to reach approximately RMB32.3 billion and RMB16.0 billion by 2030, representing CAGRs of approximately 28.6% and 33.4%, respectively, from 2025 to 2030. This growth is expected to be supported by wider adoption in higher-value applications, the expansion of flexible manufacturing, and continued advances in AI-enabled capabilities.

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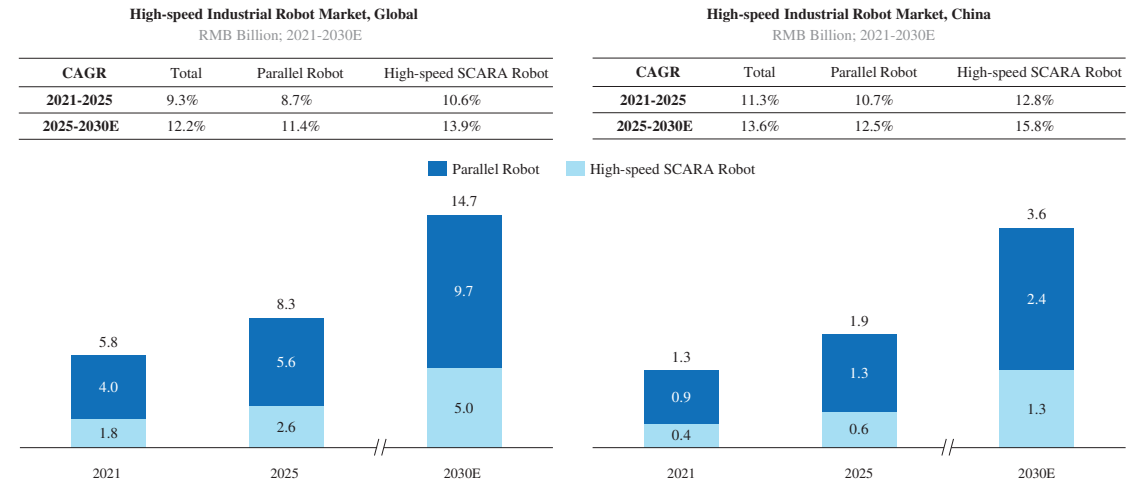
Source: Frost & Sullivan Analysis and Estimates

Note: The market size refers to the total shipment value of cobots.

Global and China's High-speed Industrial Robot Market

High-speed industrial robots refer to a category of industrial robots designed with high cycle rates, high end-effector speeds, and high acceleration as their core performance objectives. They are primarily deployed in industrial scenarios characterised by short operating cycles, highly repetitive tasks, and stringent requirements for throughput per unit time. The core value of high-speed Industrial Robot lies in significantly reducing single-cycle operation time while maintaining the required levels of precision and operational stability, thereby enhancing overall production line capacity and improving equipment overall equipment effectiveness.

High-speed industrial robots are increasingly emerging as a key development direction in the technological evolution of industrial robots, driven primarily by the manufacturing sector's sustained demand for higher throughput efficiency, lower unit production costs, and stable capacity output. Between 2021 and 2025, the global and China's high-speed industrial robot markets experienced steady growth, with shipment values rising from approximately RMB5.8 billion and RMB1.3 billion to approximately RMB8.3 billion and RMB1.9 billion, respectively. The period from 2022 to 2024 saw slight market fluctuations, mainly attributable to the volatility in the aforementioned SCARA robot segment.



Source: Frost & Sullivan Analysis and Estimates

Note: The market size refers to the total shipment value of high-speed industrial robots.

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Specifically, the sustained growth of high-speed industrial robots is predominantly fuelled by the increasing demands of downstream sectors. In the food and beverage industry, high-speed pick-and-place operations for flexible packaging, sorting, and bottling are essential to meet high-volume throughput. The consumer goods and cosmetics sector rely on rapid yet delicate handling for filling, capping, and assembly. In pharmaceutical, stringent cleanroom standards and the need for precise manipulation in packaging and sterile handling drive adoption. Furthermore, the automotive industry, especially with the shift toward electric vehicles, requires these robots for battery assembly, power electronics manufacturing, and precision component placement. These diverse, sector-specific requirements, along with pressures to shorten cycle times and enhance production flexibility, continue to accelerate the deployment of high-speed SCARA and parallel robots in automated production environments.

Looking forward, as control precision, payload optimisation, and vibration damping continue to improve, high-speed industrial robots are expected to extend into assembly, inspection, and selected precision manufacturing processes, with their application boundaries set to expand further. Both the global and China’s high-speed industrial robot markets are projected to grow at an accelerated pace, at CAGRs of approximately 12.2% and 13.6% from 2025 to 2030, reaching approximately RMB14.7 billion and RMB3.6 billion by 2030, respectively.

COMPETITIVE LANDSCAPE OVERVIEW

Growth Drivers of China’s High-speed Industrial Robot Market

- **Labour Structure Shifts and Rising Costs:** Global manufacturing is increasingly challenged by structural changes in labour supply. In traditional manufacturing hubs such as China, growth in the working-age population has slowed, and labour costs continue to rise. Against this backdrop, industrial robots offer advantages in terms of predictable operating costs, consistent output quality and continuous operation, resulting in a favourable total cost of ownership profile. Within this category, high-speed industrial robots — characterised by rapid motion execution, compact structures, and flexible deployment — are increasingly adopted in applications requiring high-frequency operations, repetitive tasks, and rapid production cycles. Their core value lies in directly reducing reliance on manual labour and associated operational risks, while ensuring production continuity and quality stability, which in turn enhances cost predictability and controllability.
- **Downstream Demand for Responsive and Efficiency-driven Production Lines:** As manufacturing trends increasingly toward product diversification and customisation, downstream sectors emphasise not only production flexibility and agility, but also greater efficiency in cycle time, throughput, and equipment utilisation. High-speed industrial robots, with their rapid motion execution and high repeatability, combined with programmable operation and modular integration, can be deployed as highly efficient production modules. When equipped with adaptive end-effectors, they enable quick reconfiguration and fast changeovers, effectively supporting high-frequency product switching, multi-variant batch production, and complex high-speed processes. Their role is critical in achieving both high throughput and adaptive manufacturing, serving as a key enabler of efficient, resilient and responsive production lines.
- **Advances across Multiple Disciplines Underpin the Intelligence of Robots:** Improvements in the performance and cost efficiency of core hardware provide a solid foundation for achieving higher levels of precision, speed and reliability in robot execution. In parallel, rapid progress in perception algorithms, machine vision, motion control algorithms, and other AI algorithms has significantly enhanced robots’ capabilities in environmental perception, motion capabilities and information processing. Breakthroughs in hardware performance enable the stable deployment of increasingly complex algorithms, while advanced algorithms

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fully unlock hardware potential. The deep integration of these two dimensions constitutes the core technological basis for the evolution of industrial robots from automated equipment toward intelligent operational units.

- **National Strategies and Industrial Policy Support:** China has identified intelligent manufacturing as a core strategy for enhancing national competitiveness, as reflected in policy frameworks such as the “14th Five-Year Plan for the Development of Intelligent Manufacturing” and “Implementation Opinions on Promoting the Innovative Development of Future Industries”. Industrial robots, as key enabling equipment, play a critical role in advancing manufacturing automation and digital transformation. At the policy level, initiatives including the ““Robot+” Application Action Plan” and the “14th Five-Year Plan for the Development of Robot Industry” underscore government support for the sector and, in conjunction with other measures such as R&D incentives, industry standards and industrial alliance development, contribute to a supportive environment for the long-term development of the industrial robot industry.

Entry Barriers of China’s High-Speed Industrial Robot Market

- **Barriers in Technical Expertise & Industry Adaptation:** The high-speed industrial robot industry is technology-intensive, requiring integration of long-term accumulated system-level development capabilities and cross-disciplinary knowledge. SCARA and parallel robots must manage severe vibration and dynamic shock at high cycle rates, necessitating expertise in the design and integration of advanced control algorithms, mechanical design, and precision components. This knowledge is built through long-term R&D investment, talent cultivation, and extensive field validation, which new entrants often lack. Additionally, applications span diverse sectors like electronics, FMCG, and automotive, each with distinct speed, precision, and safety demands. New players without sector-specific domain know-how struggle to address specific customer needs. Furthermore, the necessity for rigorous product reliability testing and operational validation demands heavy asset investment throughout the entire process from R&D, testing, to mass production. This capital-intensive approach significantly increases upfront costs and operational risks, thereby establishing a substantial barrier to entry.
- **Barriers in Manufacturing Scale and Supply Chain Integration:** High-speed applications demand tight consistency in machining accuracy, assembly processes, and end-of-line testing to ensure stable performance under continuous high-frequency operation. Achieving such consistency typically requires scaled production, standardised manufacturing systems, and mature quality management, which are difficult for new entrants to replicate quickly. In parallel, leading players benefit from integrated supply chains for critical components such as servo systems, controllers, precision parts, and key suppliers of fixtures and testing equipment, enabling shorter lead times, better cost control, and faster iteration. These capabilities collectively raise the threshold for competitive, large-scale commercialisation.
- **Barriers in Customer Acquisition and Brand Recognition:** The high-speed industrial robot market is characterised by long sales cycles and high customer switching costs. End-users require extensive on-site validation, performance testing, and technical support before adoption. Established players benefit from years of field experience, proven track records, and strong brand recognition, making it difficult for new entrants to gain customer trust. Additionally, the high cost of failure in production lines means customers are risk-averse and prefer suppliers with established reliability. This creates a “proof of concept” barrier where new players must invest heavily in demonstration projects and customer education, often without guaranteed returns, significantly increasing their time-to-market and capital requirements.

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- **Barriers in Regulatory Compliance and Certification:** High-speed industrial robots must comply with stringent international safety standards and industry-specific certifications. The certification process is time-consuming and costly, requiring extensive documentation, testing, and third-party validation. Established manufacturers have already navigated these regulatory hurdles and maintain ongoing compliance systems, while new entrants must invest significant resources in understanding and meeting these requirements. Furthermore, industry-specific certifications for sectors like food and beverage or pharmaceutical add additional layers of complexity. The lengthy approval timelines and high compliance costs create significant delays and financial burdens for market entry, favouring incumbents with established regulatory frameworks.

Future Trends of China’s High-speed Industrial Robot Market

- **Application Penetration across Industries and Production Stages:** The expansion of high-speed industrial robot applications exhibits both horizontal broadening and vertical deepening. Horizontally, adoption is extending from traditional sectors such as food and consumer goods to emerging industries, including semiconductor and renewable energy, which require higher standards of cleanliness, precision and reliability. Vertically, applications are moving beyond labour substitution in single repetitive tasks — such as material handling and sorting — toward more complex processes — such as inspection, precision assembly and dispensing — enabling broader functional coverage across individual production lines and entire factory operations. This trend reflects the evolution of high-speed industrial robots from addressing localised automation needs to supporting end-to-end flexible and intelligent manufacturing.
- **Technology Progression Toward Higher Autonomy and Adaptability:** Building on the convergence of high-performance hardware and intelligent algorithms, high-speed industrial robots are evolving from assisted execution toward greater autonomous decision-making. Hardware development continues to advance toward higher integration, precision and weight-to-payload efficiency, supporting improved motion performance, precision and load capacity, and providing a stable physical foundation for complex tasks. At the software and algorithm level, progress in areas such as real-time perception, autonomous task planning, and process-adaptive optimisation is enabling closed-loop operation in dynamic and unstructured environments. Through tighter hardware — software co-design and system-level integration, high-speed industrial robots are achieving higher levels of autonomy and transferability.
- **Ecosystem-Based and Integrated Solution Capabilities as Key Competitive Factors:** To build sustainable competitive advantages, leading robot manufacturers are extending upstream along the technology stack through collaborative or independent development of core components and advanced intelligent algorithms, strengthening self-control over core technologies and product performance. Downstream, greater emphasis is being placed on building open and collaborative ecosystems with system integrators, end-effector suppliers and end users. Through ecosystem collaboration and the integration of industry-specific process know-how, manufacturers are delivering stable, easy-to-deploy end-to-end solutions, thereby establishing new competitive advantages centered on overall performance and service value.
- **Domestic Substitution and Global Expansion:** Against the backdrop of China’s manufacturing sector placing increasing emphasis on self-reliance and supply chain security, downstream industries are showing rising acceptance of domestically produced industrial robots, with deployment expanding across multiple sectors and applications as scale-driven cost advantages and implementation feasibility become more evident. Meanwhile, the acceleration of intelligent manufacturing globally is sustaining overseas demand for cost-effective, fast-to-deploy automation solutions, creating expansion opportunities for Chinese vendors with sufficient technological maturity and cost control capabilities. Overall, domestic substitution strengthens the industry’s internal growth foundation, while international expansion provides incremental structural growth.

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Ranking of the Global Leading High-speed Industrial Robot Manufacturers

In 2025, the global shipment volume of the top five high-speed industrial robot companies reached approximately 12,654 units in total, representing around 31.7% of the global shipment volume of high-speed industrial robots. In 2025, the Company ranked 4th in the global high-speed industrial robot market with share of approximately 5.2% as measured by shipment volume.

The table below sets forth the top five high-speed industrial robot manufacturers in terms of the global shipment volume in 2025.

Ranking of the Leading High-speed Industrial Robot Manufacturers, Global⁽¹⁾, 2025 by Global Shipment Volume, Unit

Ranking	Company	Global Shipment Volume	Market Share ⁽²⁾
1	Company A ⁽³⁾	3,590	9.0%
2	Company B ⁽⁴⁾	3,200	8.0%
3	Company C ⁽⁵⁾	2,230	5.6%
4	Our Company	2,075	5.2%
5	Company D ⁽⁶⁾	1,559	3.9%
Top 5		12,654	31.7%

Notes:

- (1) The ranking is based on the global shipment volume of high-speed industrial robots by global companies.
- (2) Denominator of the percentage is the global shipment volume of high-speed industrial robots, which is approximately 39.9 thousand units in 2025.
- (3) Company A is a company established in 1988 and it is headquartered in Zurich, Switzerland. It is a technology leader in the electrical and automation field, with its global operations organised into four business divisions: Electrification, Automation, Motion Control, and Robots & Discrete Automation. The company is committed to integrating engineering expertise with software technologies to deliver solutions that optimise manufacturing, transportation, energy, and operational efficiency. It employs approximately 105,000 people worldwide. Its industrial robot product portfolio includes articulated robots, SCARA robots, parallel robots, and cobots.
- (4) Company B is a company established in 1892 and it is headquartered in Pfäffikon, Switzerland. It focuses on three core business areas: industrial connectors, industrial robots, and textile machinery. Its industrial robot product line primarily includes SCARA and articulated robots. With a global workforce of approximately 6,000 employees, the company is committed to driving innovation and delivering high-precision solutions across industries worldwide.
- (5) Company C is a company established in 1975 and it is headquartered in Suwa, Japan. It offers a wide range of industrial robots, including SCARA robots, six-axis robots, and cobots. With a global workforce of approximately 76,000 employees, the company, the company widely ranges from printing solutions and visual communications to manufacturing-related and wearables business.
- (6) Company D is a company listed on Hong Kong Stock Exchange and headquartered in Taizhou, Zhejiang Province. Established in 2012, it is a company integrating industrial robot R&D and manufacturing, control system development, vision system development, intelligent manufacturing solutions, and equipment provision. Its industrial robot products include articulated robots, SCARA robots, and parallel robots.

Ranking of Leading High-speed Industrial Robot Manufacturers in China

In 2025, China’s shipment volume of the top five high-speed industrial robot companies reached approximately 6,178 units, representing around 41.8% of the total market. In 2025, the Company ranked 1st in China’s high-speed industrial robot market with share of approximately 13.4% as measured by shipment volume.

The table below sets forth the top five high-speed industrial robot manufacturers in terms of China’s shipment volume in 2025.

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Ranking of the Leading High-speed Industrial Robot Manufacturers, China⁽⁷⁾, 2025 by Shipment Volume in China, Unit

Ranking	Company	Shipment Volume in China	Market Share ⁽⁸⁾
1	Our Company	1,978	13.4%
2	Company D ⁽⁶⁾	1,250	8.5%
3	Company C ⁽⁵⁾	1,160	7.8%
4	Company B ⁽⁴⁾	900	6.1%
5	Company A ⁽³⁾	890	6.0%
Top 5		6,178	41.8%

Notes:

(7) The ranking is based on the shipment volume of high-speed industrial robots in China by global companies.

(8) Denominator of the percentage is the shipment volume of high-speed industrial robots in China, which is approximately 14.8 thousand units in 2025.

Ranking of the Global Leading Parallel Robot Manufacturers

In 2025, the global parallel robot market exhibited a relatively dispersed competitive landscape. The top five parallel robot companies shipped a total of approximately 8,193 units globally, accounting for approximately 34.4% of the global shipment volume of parallel robots.

The table below sets forth the top five high-speed industrial robot manufacturers in terms of the global shipment volume in 2025.

Ranking of the Leading Parallel Robot Manufacturers, Global⁽⁹⁾, 2025 by Global Shipment Volume, Unit

Ranking	Company	Global Shipment Volume	Market Share ⁽¹⁰⁾
1	Company A ⁽³⁾	3,430	14.4%
2	Our Company	1,824	7.7%
3	Company D ⁽⁶⁾	1,559	6.5%
4	Company E ⁽¹¹⁾	770	3.2%
5	Company F ⁽¹²⁾	610	2.6%
Top 5		8,193	34.4%

Notes:

(9) The ranking is based on the global shipment volume of parallel robots by global companies.

(10) Denominator of the percentage is the global shipment volume of parallel robots, which is approximately 23.8 thousand units in 2025.

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- (11) Company E is a company established in 1933 and it is headquartered in Kyoto, Japan. It is a globally recognised manufacturer of automation control and electronic equipment, with core competencies in sensing and control technologies. Its product portfolio spans a wide range of fields, including industrial automation control systems, electronic components, social infrastructure systems, and healthcare equipment, and the company employs more than 28,000 people worldwide. Its industrial robot product portfolio includes articulated robots, SCARA robots, and parallel robots.
- (12) Company F is a company established in 1878 and it is headquartered in Tokyo, Japan. It is a diversified heavy industry group with operations spanning aerospace, railway vehicles, shipbuilding & marine, precision machinery, and industrial robots. The company employs approximately 40,000 people, and its industrial robot offerings include articulated robots, SCARA robots and parallel robots.

Ranking of Leading Parallel Robot Manufacturers in China

In 2025, China’s parallel robot market exhibited a relatively higher degree of concentration, with the total shipment volume of the top five companies reached approximately 4,604 units in China, representing around 54.2% of the total shipment volume of parallel robots in China. The table below sets forth the top five parallel robot manufacturers in terms of China’s shipment volume in 2025.

**Ranking of the Leading Parallel Robot Manufacturers, China⁽¹³⁾, 2025
by Shipment Volume in China, Unit**

Ranking	Company	Shipment Volume in China	Market Share ⁽¹⁴⁾
1	Our Company	1,729	20.4%
2	Company D ⁽⁶⁾	1,250	14.7%
3	Company A ⁽³⁾	760	8.9%
4	Company G ⁽¹⁵⁾	540	6.4%
5	Company F ⁽¹²⁾	325	3.8%
Top 5		4,604	54.2%

Notes:

- (13) The ranking is based on the shipment volume of parallel robots in China by global companies.
- (14) Denominator of the percentage is the shipment volume of parallel robots in China, which is approximately 8.5 thousand units in 2025.
- (15) Company G is a company established in 2017 and it is headquartered in Zhenjiang, Jiangsu Province. It is a technology-oriented company integrating industrial robot systems with automation solutions. The company focuses on the research, development, and sales of parallel robots, with products widely applied across industries including food, pharmaceuticals, logistics, consumer goods, consumer electronics, and renewable energy, and distributed to markets worldwide.