

Hospitality Robot Market to Reach USD 7.05 Billion by 2035 at 24.5% CAGR

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2026 /EINPresswire.com/ -- Hospitality robots represent a diverse category of autonomous and semi-autonomous machines specifically designed to perform service-oriented tasks within the hospitality industry. These intelligent systems encompass delivery

robots for room service and amenities, cleaning and disinfection robots for maintaining hygiene standards, reception and concierge robots for guest engagement, and kitchen and cooking robots for food preparation . The deployment of these robots is transforming service delivery across hotels, resorts, restaurants, airports, and other travel and leisure venues, offering automation and convenience through intelligent machines capable of streamlining operations, reducing labor costs, and enhancing customer experiences .

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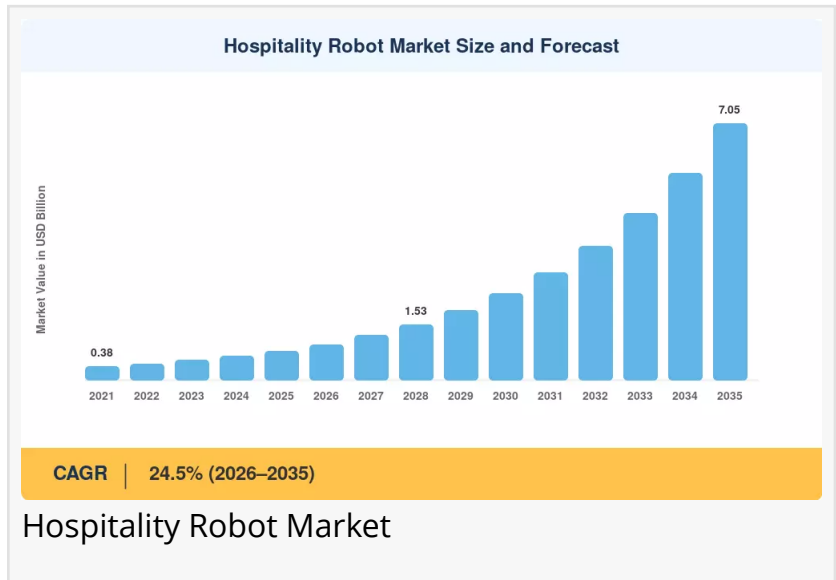
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The market's exceptional growth trajectory is driven by several powerful catalysts. Acute labor shortages and rising labor costs across the hospitality sector, particularly in developed regions, are compelling operators to adopt automation to maintain service quality and profitability . The global hospitality industry faces significant staffing challenges, with the International Federation of Robotics

(IFR) identifying staff shortages as a key driver for companies to adopt service robots .

Additionally, growing consumer demand for contactless, hygienic, and tech-enhanced service experiences—accelerated by the post-pandemic environment—is creating strong pull factors, especially among millennial and Gen Z travelers .



Industry trends indicate a decisive shift toward more sophisticated, AI-integrated robotic solutions. The integration of artificial intelligence, machine learning, natural language processing, and IoT connectivity is enabling the development of robots capable of sophisticated interactions, navigation, and task execution . These technological advancements make robots increasingly viable replacements or supplements to human staff across hospitality operations. The robot-as-a-service (RaaS) model has gained impressive traction, growing by 31% as more companies opt for subscription or rental agreements rather than outright purchases, lowering the entry barrier for technology adoption .

Technological developments are rapidly expanding the market's capabilities. Advancements in battery life, wireless charging, and miniaturized sensors have enhanced robot mobility and autonomy . The emergence of AI-powered analytics and customer feedback systems enables real-time service personalization, while integration with property management systems (PMS) and customer relationship management (CRM) platforms ensures seamless guest experiences . Leading companies are developing innovative solutions such as AI-integrated service robots with LiDAR sensors, multiple cameras for intelligent navigation, and autonomous capabilities to learn table locations and efficiently complete deliveries .

Policy and regulatory influence is beginning to shape the market landscape. Regulatory incentives in some regions promoting automation and digital transformation in hospitality are propelling market expansion . Smart city developments and 5G infrastructure build-out are supporting faster communication and more responsive robotic systems . Emerging regulatory frameworks for safety, privacy, and ethical usage of robots are beginning to emerge, particularly in developed markets .

The demand outlook remains exceptionally strong, with the market poised for sustained exponential growth. North America was the largest region in the hospitality robots market in 2025, while Asia-Pacific is expected to be the fastest-growing region . The expansion of the tourism industry serves as a significant driver, with international visits projected to reach 77.7 million in the United States alone in 2024, 85.2 million in 2025, and 96.8 million by 2028, according to OECD data . The market is expected to expand into mid-tier and budget segments as hardware costs decline and software becomes more customizable .

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Market Segmentation

By Robot Type

The [hospitality robot market](#) is segmented by robot type into Delivery Robots, Cleaning & Disinfection Robots, Reception & Concierge Robots, Kitchen & Cooking Robots, and Other (Pool, Security, Luggage) robots. Delivery robots, often equipped with LiDAR, SLAM navigation, and IoT connectivity, are deployed to transport amenities, food, and other items within hotel premises,

ensuring timely service and minimizing human contact—a critical function in the post-pandemic environment . Cleaning and disinfection robots are gaining widespread adoption due to their ability to maintain high hygiene standards through autonomous vacuuming, floor scrubbing, and UV disinfection . Reception and concierge robots, typically humanoid in design, are revolutionizing guest engagement by automating check-ins, providing real-time information, and facilitating multilingual interaction . Kitchen and cooking robots are being deployed to automate repetitive tasks, helping businesses address labor shortages and improve consistency in food preparation .

By End-User

End-user segmentation covers Hotels & Resorts, Restaurants & Food Service, Travel & Leisure Venues, and Others (Hospitals, Senior Care). Hotels represent the largest end-use segment, leveraging robots for front desk tasks, in-room deliveries, cleaning, and concierge services . High-end and mid-tier hotels are rapidly adopting robotic solutions to maintain service standards amid labor shortages and rising wage costs. Restaurants and bars are exploring delivery robots, robotic bartenders, and automated cleaning systems to handle order delivery and hygiene maintenance efficiently during staff shortages or peak demand hours . Travel and leisure venues, including airports, cruise ships, and theme parks, are integrating robots to manage crowds, provide information, and ensure sanitation .

By Navigation Technology

Navigation technology segmentation includes SLAM-Based Navigation, AI Vision-Based Navigation, Magnetic/Track-Guided, and Hybrid Navigation. SLAM (Simultaneous Localization and Mapping)-based navigation enables robots to build maps and navigate dynamic environments, essential for delivery robots operating in complex hotel layouts . AI vision-based navigation uses cameras and deep learning algorithms for advanced obstacle avoidance and path planning. Hybrid navigation systems combine multiple technologies to ensure robust performance across diverse hospitality environments. The integration of advanced AI technologies, including large models, multimodal learning, and real-time decision-making algorithms, is critical for robots to operate autonomously and adapt to dynamic environments .

By Region

Regional segmentation includes North America, Europe, Asia Pacific, South America, and the Middle East and Africa. North America was the largest region in the hospitality robots market in 2025, driven by high labor costs and early technology adoption . Asia-Pacific is the fastest-growing region, fueled by rapid digitalization, high consumer acceptance of robotics, and supportive government policies, particularly in China .

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Regional Analysis

North America

North America was the largest regional market for hospitality robots in 2025, with the U.S. market estimated at US\$237.0 million . High labor costs, acute staffing shortages, and high consumer acceptance of technology drive adoption across hotels, restaurants, and travel venues. The region benefits from a mature robotics ecosystem, with numerous startups and established players offering innovative solutions. Leading companies such as Bear Robotics, Relay Robotics, and Savioke have a strong presence, and the RaaS model is gaining significant traction . The U.S. hospitality sector is increasingly deploying robots for front desk tasks, room service delivery, cleaning, and concierge services.

Europe

Europe represents a significant and growing market, with Germany forecast to grow at approximately 20.2% CAGR . The region's strong regulatory focus on worker safety and health standards drives adoption of cleaning and disinfection robots. High labor costs and the premium hospitality sector's emphasis on service innovation fuel demand for sophisticated robotic solutions. The UK and France are key markets, with hotels and restaurants increasingly integrating robots to enhance guest experiences and operational efficiency . Italy and Spain, with their large tourism sectors, represent growing opportunities.

Asia-Pacific

Asia-Pacific is the fastest-growing regional market, with China forecast to grow at a 25.6% CAGR to reach US\$193.2 million by 2030 . China dominates the region due to high digitalization rates, unique market demands, and strong policy support. According to China's hospitality digitalization report, over 80% of mid-to-large-sized hotels have partially or fully digitized their operations, accelerating robot integration . The prevalence of food delivery in China has spurred high demand for in-room delivery services, fueling robot adoption for room service . Japan and South Korea are also significant markets, driven by advanced robotics expertise and high consumer acceptance of technology .

Rest of the World

The Rest of the World segment, encompassing South America and the Middle East and Africa, presents developing market opportunities. The Middle East, particularly Saudi Arabia and the UAE, is adopting robotic concierge and luggage handling systems, especially in high-end luxury properties as part of smart hospitality initiatives . Southeast Asian markets are beginning to adopt robotic solutions in hotels and resorts, driven by tourism growth and labor shortages. Latin America, led by Brazil, is an emerging market with growing interest in automation to improve operational efficiency and guest satisfaction .

Competitive Landscape / Key Players

The hospitality robot market is characterized by the presence of numerous global and regional players competing on technology innovation, product quality, and service capabilities. Key companies operating in this market include LG Electronics Inc., Panasonic Corporation, SoftBank

Robotics Group Corp., Bear Robotics Inc., Pudu Robotics, Keenon Robotics, Relay Robotics Inc., Savioke Inc., Aethon Inc., and PAL Robotics SL .

Strategic developments in the market include significant product innovations and acquisitions. In February 2023, Bear Robotics introduced Servi, a novel service robot designed to transform the food service sector, equipped with AI, autonomous capabilities, LiDAR sensors, and multiple cameras for intelligent navigation . In August 2023, Circus SE acquired Aitme GmbH to access cutting-edge kitchen robotics technology for integration into its micro-kitchen hubs . The top five players in the hospitality robotic-based AI agent market for hotel scenarios in China collectively accounted for a 27.4% market share in 2024, with the largest player holding 13.9% share .

Competitive differentiation increasingly hinges on AI capabilities, navigation technology, integration with property management systems, and service models. Leading companies are moving beyond one-off sales to offer subscription-based models, providing steady revenue streams and lowering the entry barrier for hotels . The ability to provide seamless integration with hotel infrastructure, such as elevator control systems and centralized dispatching platforms, is a key competitive factor . Companies that invest in cutting-edge AI technologies, including large models, multimodal learning, and real-time decision-making algorithms, are gaining competitive advantage .

Latest Industry News & Developments

Recent industry developments highlight the ongoing transformation of the hospitality robot market toward greater sophistication and integration. The International Federation of Robotics reported that service robots for professional use reached almost 200,000 units sold in 2024, with hospitality robots remaining the second-largest application category at more than 42,000 units sold . While hospitality robot sales declined 11% from the previous year, the sector is evolving with new applications emerging, such as food and beverage preparation .

The robot-as-a-service (RaaS) fleet has grown impressively by 31%, with companies increasingly entering subscription or rental agreements rather than purchasing robots outright . This trend is particularly pronounced in the transportation and logistics segment, where RaaS enjoyed a 42% growth rate in 2024 .

In February 2023, Bear Robotics introduced Servi, an AI-integrated service robot designed to transform the food service sector by serving drinks and food, clearing tables, and facilitating improved customer service . In August 2023, Circus SE acquired Aitme GmbH to integrate cooking robotics technology into its micro-kitchen hubs, specializing in executing intricate preparation tasks with precision and speed .

Market Challenges & Opportunities

Key restraints facing the hospitality robot market include high initial investment and integration complexity, which remain major barriers for small and mid-sized hospitality businesses

considering robotic solutions . The need for sufficient industry know-how to design solutions tailored to hotel environments requires intimate knowledge of guest service workflows, operational efficiency, and evolving customer expectations . Leading technology development ability, including advanced AI technologies and robust hardware innovations, creates a strong barrier for new entrants, as developing and maintaining sophisticated solutions requires significant investment and expertise . Skilled talent shortages for developing and maintaining advanced robotic systems, high R&D costs, and the necessity for continuous innovation further elevate challenges .

Emerging opportunities in the market are substantial and diverse. The integration of AI-powered analytics and customer feedback systems enabling real-time service personalization presents significant potential . The emergence of robot-as-a-service (RaaS) models allows hospitality businesses to shift from CapEx to OpEx models, lowering entry barriers . The expansion into mid-tier and budget hotel segments as hardware costs decline and software becomes more customizable offers a significant growth avenue . Opportunities for developers to diversify revenue sources through subscription-based models, providing advanced robotic services without requiring significant upfront investments from hotels, are growing .

Future potential lies in the development of next-generation robots with enhanced mobility, emotion recognition, and multilingual fluency, enabling smoother and more human-like interactions . The integration of robots with mobile apps and PMS platforms will ensure seamless service coordination and real-time task management . Sustainability will influence robot design, leading to energy-efficient models and recyclable components . The evolution of robots from a service attribute to a traffic attribute, enhancing customer loyalty by offering unique, memorable interactions, represents a strategic opportunity . As robots become core to hospitality strategies, staff will be retrained to focus on high-touch services that complement automated assistance, creating a hybrid workforce model .

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Final Market Summary

The hospitality robot market is positioned for exceptional growth through 2035, driven by labor shortages, rising labor costs, growing consumer demand for contactless services, and rapid technological advancements in AI, machine learning, and robotics. The projected valuation of USD 7.05 billion reflects rapidly expanding adoption across hotels, restaurants, and travel venues, with the market transitioning from early adoption to mainstream deployment.

The medium-term growth outlook remains exceptionally strong, with the market registering a remarkable CAGR of 24.5% during the forecast period. North America will continue to maintain market leadership through high labor costs and early technology adoption, while Asia-Pacific emerges as the fastest-growing region driven by high digitalization rates, supportive government policies, and strong consumer acceptance. The ongoing development of AI-integrated service

robots, RaaS models, and enhanced navigation technologies will continue to expand market possibilities and applications.

Long-term industry potential extends significantly beyond the current forecast horizon. The convergence of technological advancement, changing consumer preferences, and operational pressures will continue to reshape the market landscape. The evolution toward more human-like interactions, hyper-personalized services, and integration with smart hotel ecosystems will drive continued innovation. Manufacturers that successfully develop sophisticated, reliable, and cost-effective robotic solutions, invest in AI capabilities, and establish service networks in emerging markets will capture substantial value in this rapidly evolving market. The transformation of hospitality robots from novel gadgets to strategic assets that enhance guest experiences, operational efficiency, and competitive differentiation represents a fundamental shift in the hospitality industry's approach to service delivery, enabling hotels and restaurants to meet rising customer expectations while addressing persistent labor challenges.

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