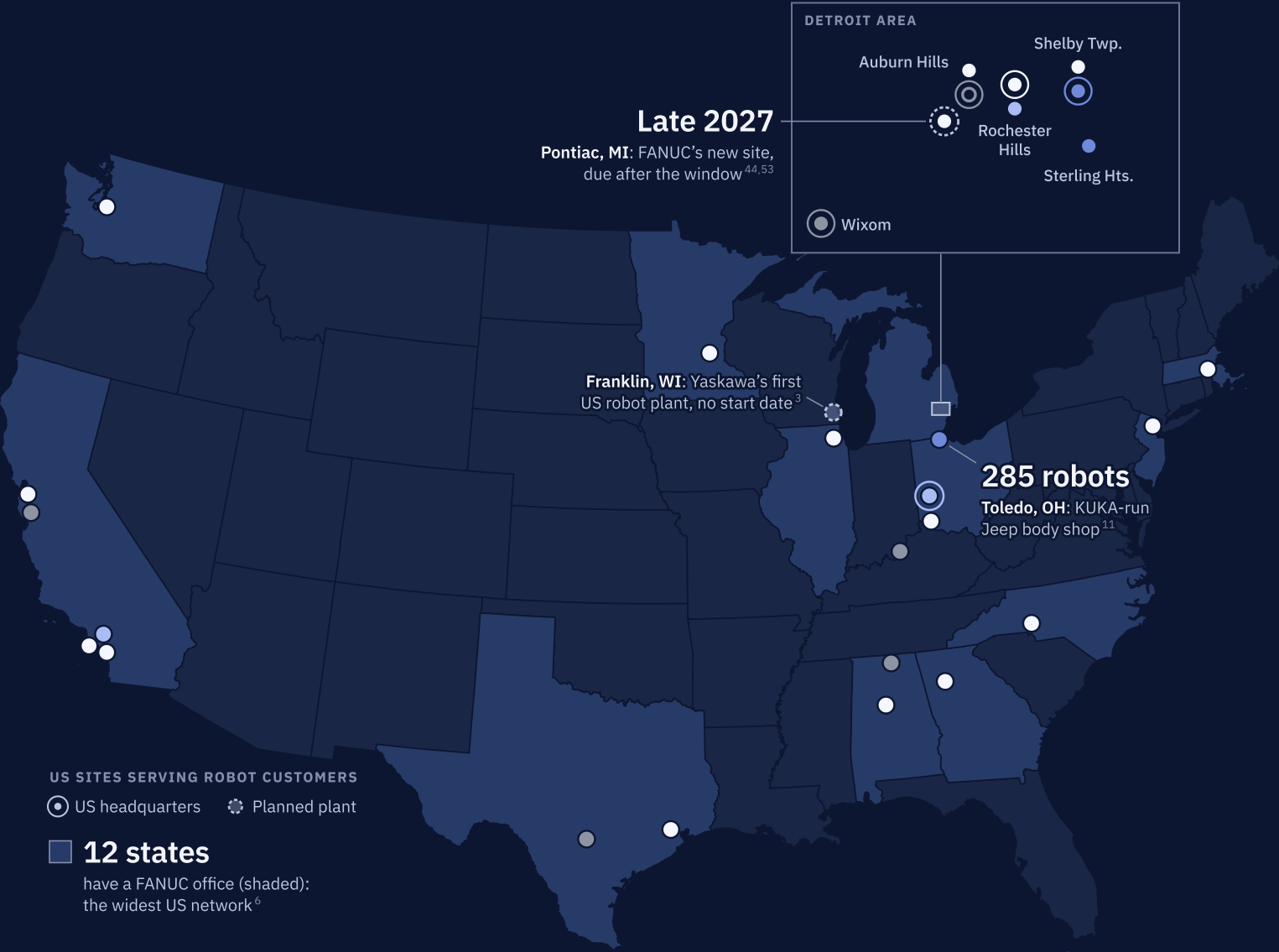


Sourcing 1,000 body-in-white robots in 12 months

Make FANUC lead, KUKA second source, Yaskawa fallback.

THE BUYER'S QUESTION
"I'm building a car factory and need 1000 robots for a BIW line in the next 12 months. Who would you recommend? Who has a strong support base in the US?"

All three import their spot welders, so price in 10–12.5% duty.^{1–4}



MAP PINS • THE FIVE RANKED MAKERS

1 LEAD

● **FANUC**

2 SECOND SOURCE

● **KUKA**

3 FALLBACK

● **YASKAWA**

4 WATCH

○ **ABB**

5 WATCH

● ■ **Kawasaki**

FANUC leads with 29 of 32 and top marks on the buyer's three asks.

	RFQ TO ALL THREE			NOT IN THE FIRST RFQ	
	1 LEAD FANUC Rochester Hills, MI	2 SECOND SOURCE KUKA Shelby Township, MI	3 FALLBACK YASKAWA Miamisburg, OH	4 WATCH ABB Auburn Hills, MI	5 WATCH  Kawasaki Wixom, MI
US HQ					
Weighted total of 32; by criterion	29 8+8+8+1+4	20 6+8+2+2+2	17 6+2+6+1+2	18 [†] 4+6+4+3+1	14 6+2+2+1+3
US support ×2	4 8 pts	3 6 pts	3 6 pts	2 4 pts	3 6 pts
US sites one per city	17 sites 19 offices in 17 cities	3 sites incl. Toledo body shop	3 sites HQ + regional centers	1 site Auburn Hills only	5 sites HQ + service offices
Service line US tech support	24/7 call center	24/7 hotline	24h line · 24/7 dispatch	US contact center hours Q18	24h hotline
Body-shop record ×2	4 8 pts	4 8 pts	1 2 pts	3 6 pts	1 2 pts
US body shops named plants	2 plants VW Chattanooga, 2020 GM Orion, 2015	1 plant, KUKA-run Jeep Toledo 300+ bodies a day	Honda UK only 2003; US plants Q14	Wins in Europe, China Q20	Unnamed Toyota plants Q23
Largest order or framework, mainly body-shop robots	3,500 robots BMW framework, from 2019	~5,000 robots BMW framework, 2020	~130 robots Honda UK, 2003	1,300+ robots Volvo, 2023	A few hundred robots US carmaker, 1989
Capacity ×2	4 8 pts	1 2 pts	3 6 pts	2 4 pts	1 2 pts
Output bars: per month	~10,000 /mo Q4 group est., c. 2022	China plant: ~30,000/yr Q9 Feb 2025; sold in China	5,400 /mo Oct 2023; aim ×1.5	Auburn Hills plant ~350 staff, Mar 2023 output Q17	China, 2017 fcst: 7,000/yr Q22 sales, not capacity
In the US plant and stock	Paint robots only Pontiac site: late 2027 Stock space 6,000+ Q5	No US plant EU and China plants	Franklin, WI planned no start date Q16	Builds in Auburn Hills since 2015 welding models Q17	Japan-built Wixom stock, no count
Import duty ×1	1 1 pt	2 2 pts	1 1 pt	3 3 pts	1 1 pt
US duty lower is better; at Oct 9, 2026	12.5% Japan-built, stated	10% Q9 if EU-built (likely)	12.5% Q13 imported; at Japan rate	0% Q17 if Michigan-built; Sweden-built 10%	12.5% Q22 Japan-built, stated
Stability ×1	4 4 pts	2 2 pts	2 2 pts	1 1 pt	3 3 pts
Robot sales latest year; trend	¥378.6bn FY2025 (to Mar 2026) Q1 FY2026: +18.7%	€1,010.7m FY2025 (to Dec 2025), excl. China; down from €1,092.0m	¥247.0bn FY2025 (to Feb 2026) 1H FY2026: -0.7%	\$2.3bn FY2024; discontinued ops since Q4 2025	¥92.9bn FY2025 (to Mar 2026) down ¥1.6bn
Profit test fall of 25%+ or margin under 2%	Op. income +¥24.9bn group, FY2025 y/y	Group EBIT margin 1.5% FY2025; 2024: 2.0%	Robot profit -43.3% 1H FY2026, y/y	Op. EBITA margin 12.1% robot division, FY2024	Segment profit ¥14.3bn machinery + robots, FY2025; from ¥7.0bn
Owner and what to watch	FANUC Corp., Japan FY2026 sales fcst raised to ¥948.1bn, Jul 2026	Midea (China), 100% since 2022 509 Augsburg job cuts	Yaskawa Electric Japan; ERP disruption in 1H FY2026	Sale to SoftBank \$5.375bn deal; close expected H2 2026	Kawasaki Heavy Japan; car-robot sales fcst ¥46.0bn, FY2026, incl. intercompany
Before award the condition to meet	Written allocation from Japan; capped tariff surcharge	Midea (China) ownership cleared with your program	Named US body-shop references; confirmed country of origin	Re-bid after the SoftBank sale (expected H2 2026)	Firm delivery dates; its terms call them estimates

Method: each maker scored 0–4 per criterion against a published rule (p. 20); the buyer's three asks count double. **Sources** for every score: p. 21; numbered list, Appendix B, p. 24.

Grey another basis or a partial answer, never converted · Amber trips the stability rule · Q4 open question for the RFQ, p. 19

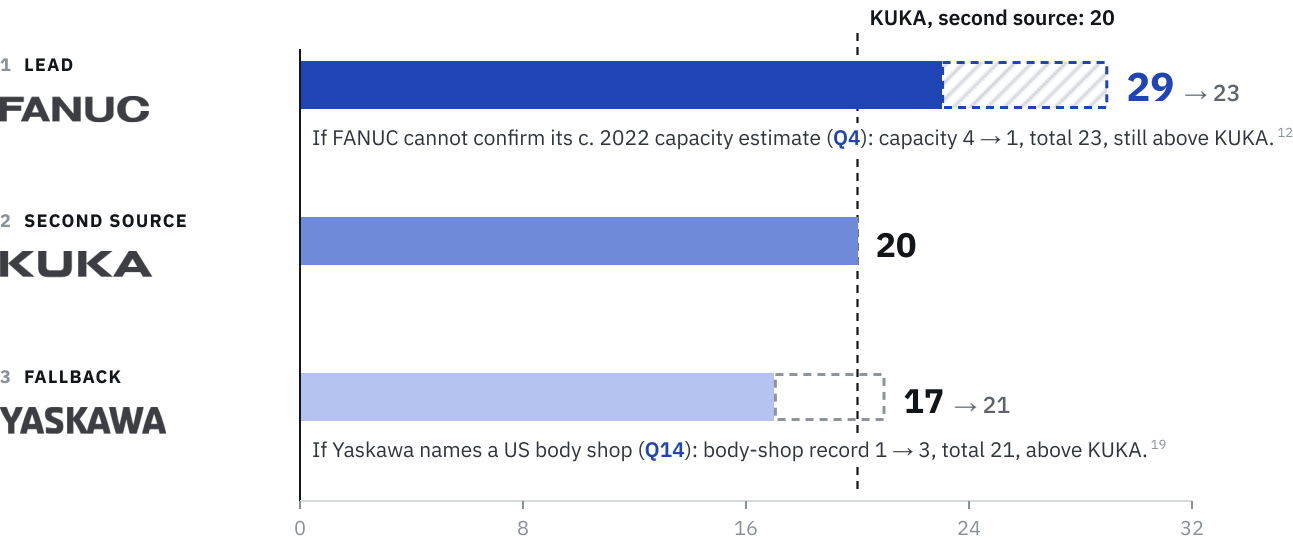
† ABB totals one point more than Yaskawa; the roles hold ABB back until the SoftBank sale closes, H2 2026 [15].

Send RFQs to all three from October 12; award by mid-January 2027, leaving about nine months for delivery.

EXHIBIT 1

FANUC leads even if its capacity estimate fails; a US body shop would lift Yaskawa past KUKA.

The three in the RFQ: weighted total of 32 if one open question goes the other way · Points



Note: each line rescores one criterion under its published rule (p. 20); every other score stays as on p. 2. Hatched: points that rest on the open question; dashed outline: points a yes would add.
Source: this study's run record; metalworkingnews.info [12]; emerald.com [19]

KEY MESSAGES

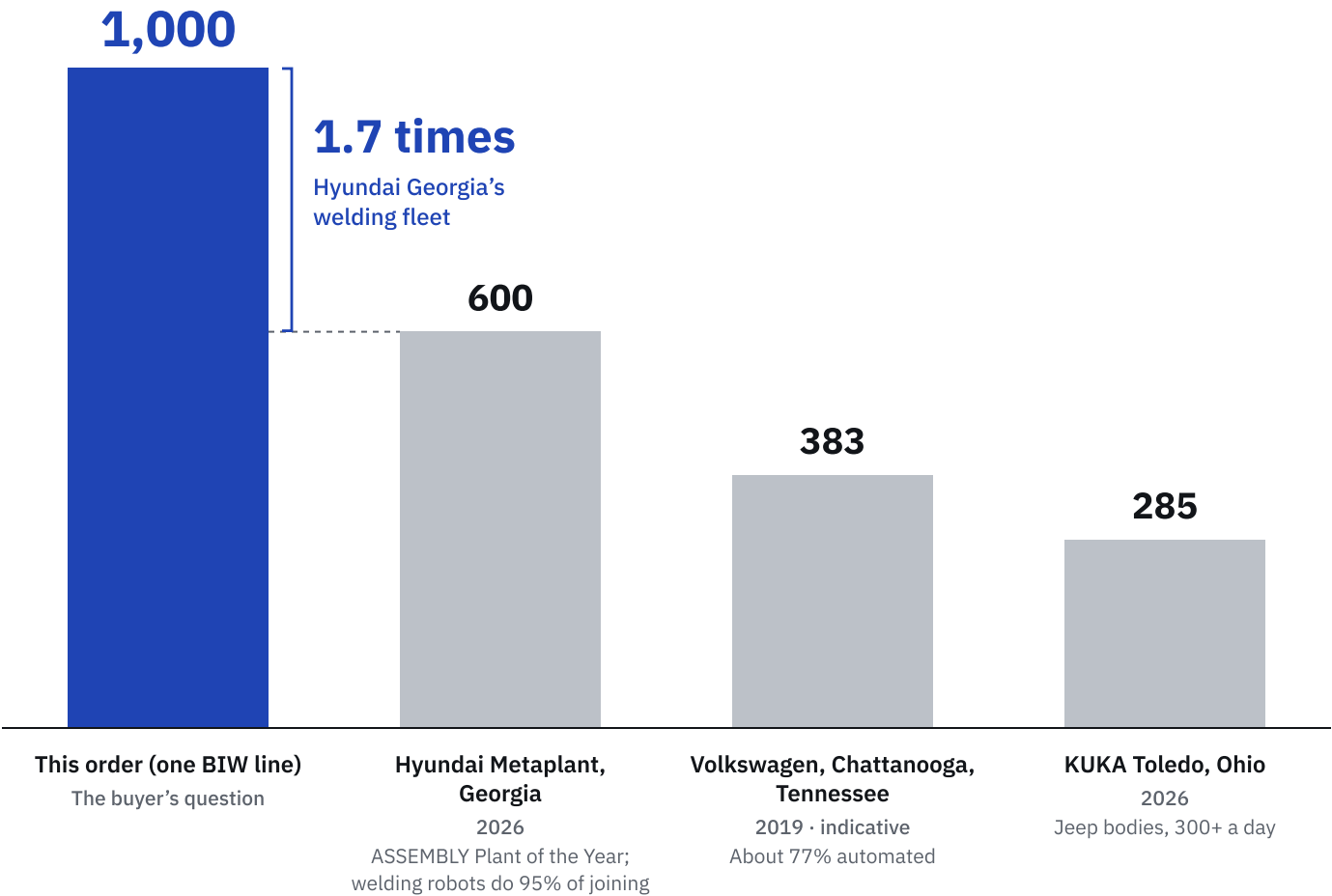
- 1 Ample capacity: 1,000 robots is ~3 days of FANUC output (c. 2022 third-party estimate), under a week of Yaskawa's. ^{12,13} p. 5
- 2 FANUC has Michigan warehouse space for 6,000+ quick-delivery robots; whether it holds spot welders is an RFQ question. ⁷ pp. 8, 19
- 3 Watch: SoftBank buying ABB's robot unit (H2 2026), China's Midea owning 100% of KUKA, and a robot-tariff probe. ¹⁵⁻¹⁷ pp. 10, 16

1,000 robots is 1.7 times Hyundai Georgia’s welding fleet.

EXHIBIT 2

This order is larger than any US body shop found.

Body-shop robots: this order vs recent US plants



Note: Hyundai Georgia runs 1,000+ robots across all its shops.²⁶
Note: VW figure is second-hand: Wikipedia, citing a 2019 documentary.²⁵
Source: this study's run record; kuka.com [11]; assemblymag.com [23]; en.wikipedia.org [25]; therobotreport.com [26]

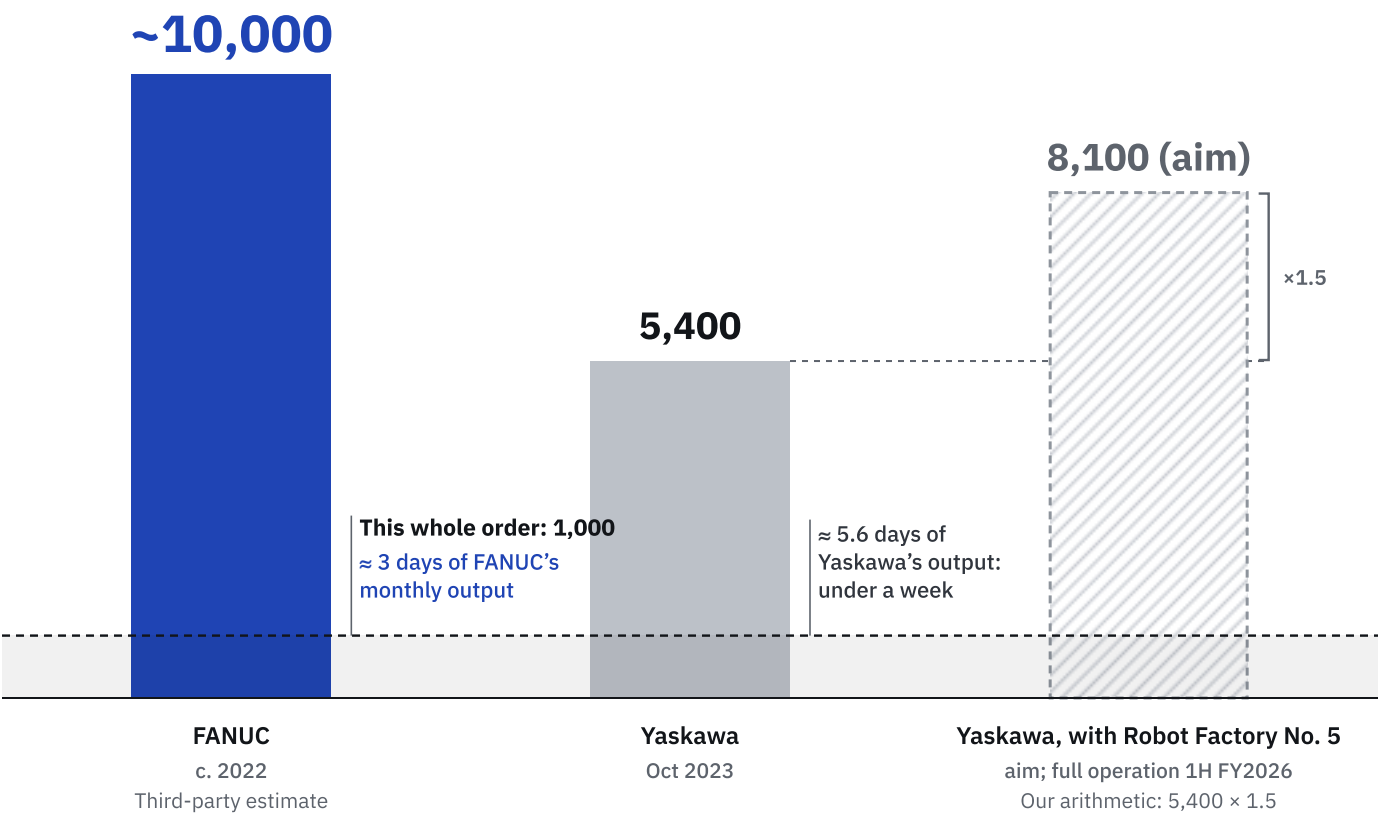
How large is a 1,000-robot order? This order is about 7% of the 13,500 robots the US auto industry installed in 2025.²⁴

1,000 robots is under a week of FANUC or Yaskawa capacity.

EXHIBIT 3

Published monthly capacity is 5–10 times this order.

Group-wide, all robot types · Robots per month



Left out: KUKA, ABB and Kawasaki publish no current capacity; KUKA's Shunde plant serves China.^{28–30,14}

Source: this study's run record; metalworkingnews.info [12]; fukuoka-now.com [13]; abb.com [14]; yaskawa-global.com [27]; yicaiglobal.com [28]; kuka.com [29]; newequipment.com [30]

Who can build 1,000 robots within 12 months?

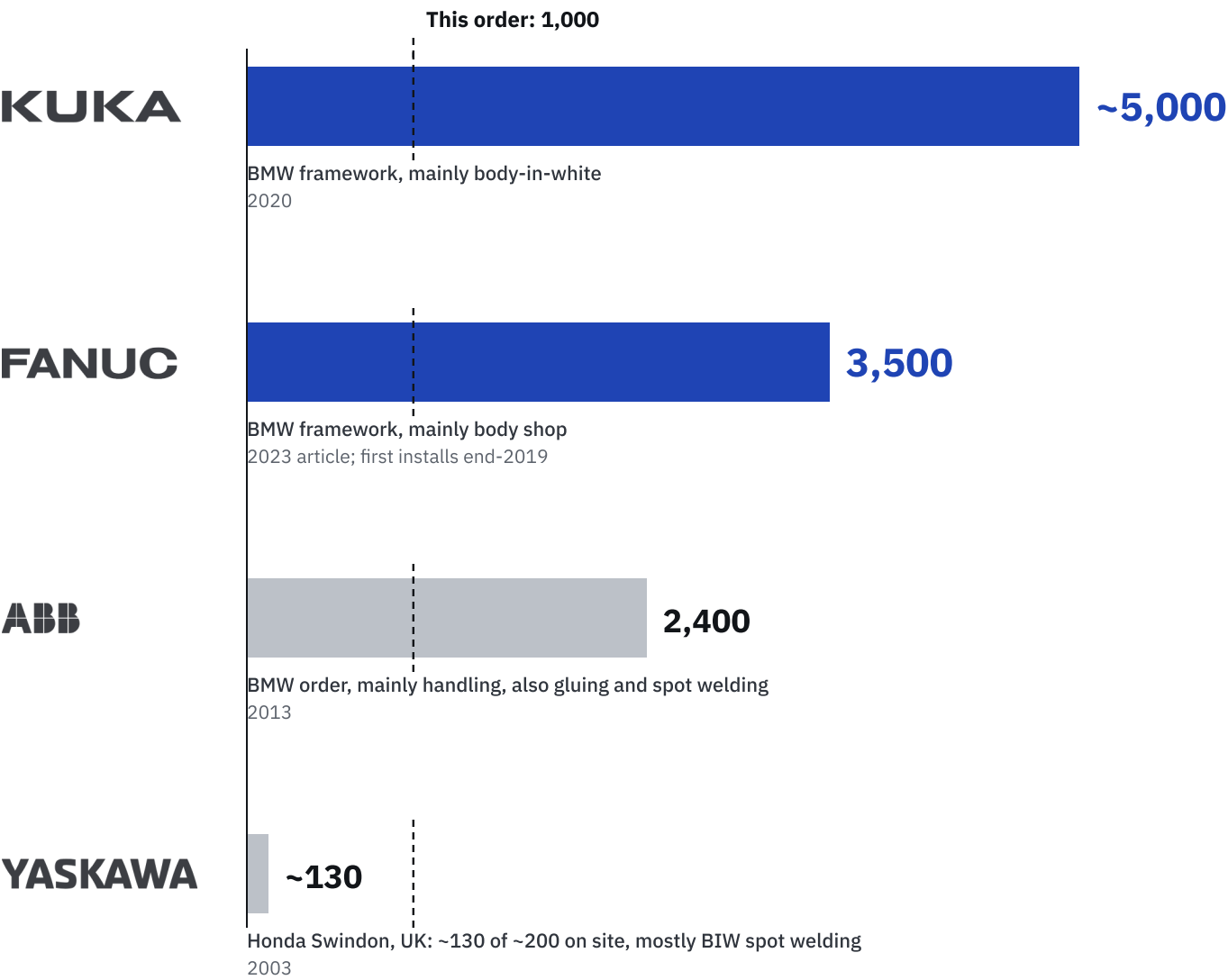
The RFQ must ask how many spot welders each will allocate to a US order.

FANUC and KUKA signed BMW body-shop frameworks of 3,500 and ~5,000 robots.

EXHIBIT 4

Three of the five have won deals above 1,000 robots.

Largest published single-customer order or framework · Robots



Note: The scorecard (p. 2) counts ABB's 1,300+ Volvo order (2023, spot welding and other packages); this BMW order was mainly handling.^{33,31}
Left out: Kawasaki: largest named order is 'a few hundred' spot welders (1989), no exact count.³⁴
Source: this study's run record; automate-uk.com [8]; kuka.com [9]; emerald.com [19]; abb.com [31, 33]; kawasakirobotics.com [34]

Who has done body-in-white at this scale? Yaskawa names one body shop: Honda Swindon, UK, in 2003.¹⁹

Only FANUC and KUKA name US body shops.

EXHIBIT 5

US body-shop references

MAKER	YEAR	PLANT	WHAT
FANUC	2020	Volkswagen, Chattanooga, TN	~600 body-shop and battery robots, of a 1,400-robot order ¹⁰
	2015	General Motors, Orion Assembly, MI	Predictive-maintenance pilot in the body shop; strategic GM supplier ³²
KUKA	2026	Stellantis (Jeep), Toledo, OH	KUKA-run since 2006: 285 robots, 300+ bodies a day ¹¹
	2018	Unnamed US automaker	Flexible body-component system, mid-size SUV; production from 2020 ³⁶

Left out: Yaskawa, ABB and Kawasaki name no US body-shop plant; their supplier awards (Ford 2026, Toyota 2019) are not plant references.^{37,34,38}
Left out: Tesla Fremont (FANUC): a 2016 report counts ~600 FANUC robots there but never says body shop.³⁵
Source: auto-innovations.net [10]; kuka.com [11]; automotivemanufacturingsolutions.com [32]; kawasakirobotics.com [34, 37]; electrek.co [35]; roboticsandautomationnews.com [36]; assemblymag.com [38]

FANUC has the widest US support: 19 offices, 24/7 call center.

EXHIBIT 6

Four makers run round-the-clock US lines; FANUC’s network is the largest.

US support, as each maker publishes it

MAKER	ROUND-THE-CLOCK LINE	US SITES	US TRAINING	STRONGEST SUPPORT FACT
FANUC	24/7 call center ⁵	19 US offices; regional field engineers ^{6,56}	FANUC Academy, Auburn Hills ⁷	Warehouse for 6,000+ quick-delivery robots, tens of thousands of parts ⁷
KUKA	24/7 hotline ³⁹	Shelby Township HQ; KUKA Systems, Sterling Heights; Toledo body shop ^{45,29,11}	KUKA Robotics USA College ⁴⁶	2,583 US staff across all units (end-2025) ¹⁶
YASKAWA	24-hour hotline; 24/7 technician dispatch ^{40,18}	Miamisburg HQ; regional centers in Rochester Hills and Irvine ⁴⁷	3 facilities, 90+ training robots ⁵⁷	99.2% first-time fix rate (self-reported) ¹⁸
 Kawasaki	24-hour hotline ⁴¹	Wixom HQ; service offices: San Jose, Louisville, Huntsville, San Antonio ⁵⁰	Wixom center, 20 robots; Louisville on request ^{51,41}	Robot and spare-parts stock at Wixom ²⁰

Note: The cover map (p. 1) shows every site serving robot customers: pins at approximate city centers; Yaskawa Franklin has no start date.³

Note: FANUC lists 19 US offices in 17 cities across 12 states; offices in one city share a pin on the cover map.⁶

Left out: Sites with no robot customers: KUKA logistics and software, ABB hubs, Kawasaki AI center, Yaskawa partner school.^{29,49,54,55}

Left out: Yaskawa America’s corporate HQ, Waukegan, IL; not a Motoman robot center.^{48,47}

Left out: ABB: US contact center and training center, but no US service hours or headcounts.^{58,49,42}

Left out: A US spare-parts column; KUKA does not state one.³⁹

Source: motoman.com [3, 18, 40, 47, 55, 57]; fanucamerica.com [5, 6, 7, 43, 56]; kuka.com [11, 16, 29, 39, 45, 46]; abb.com [14, 42, 49, 58]; kawasakirobotics.com [20, 41, 50, 51, 52, 54]; therobotreport.com [44]; yaskawa.com [48]

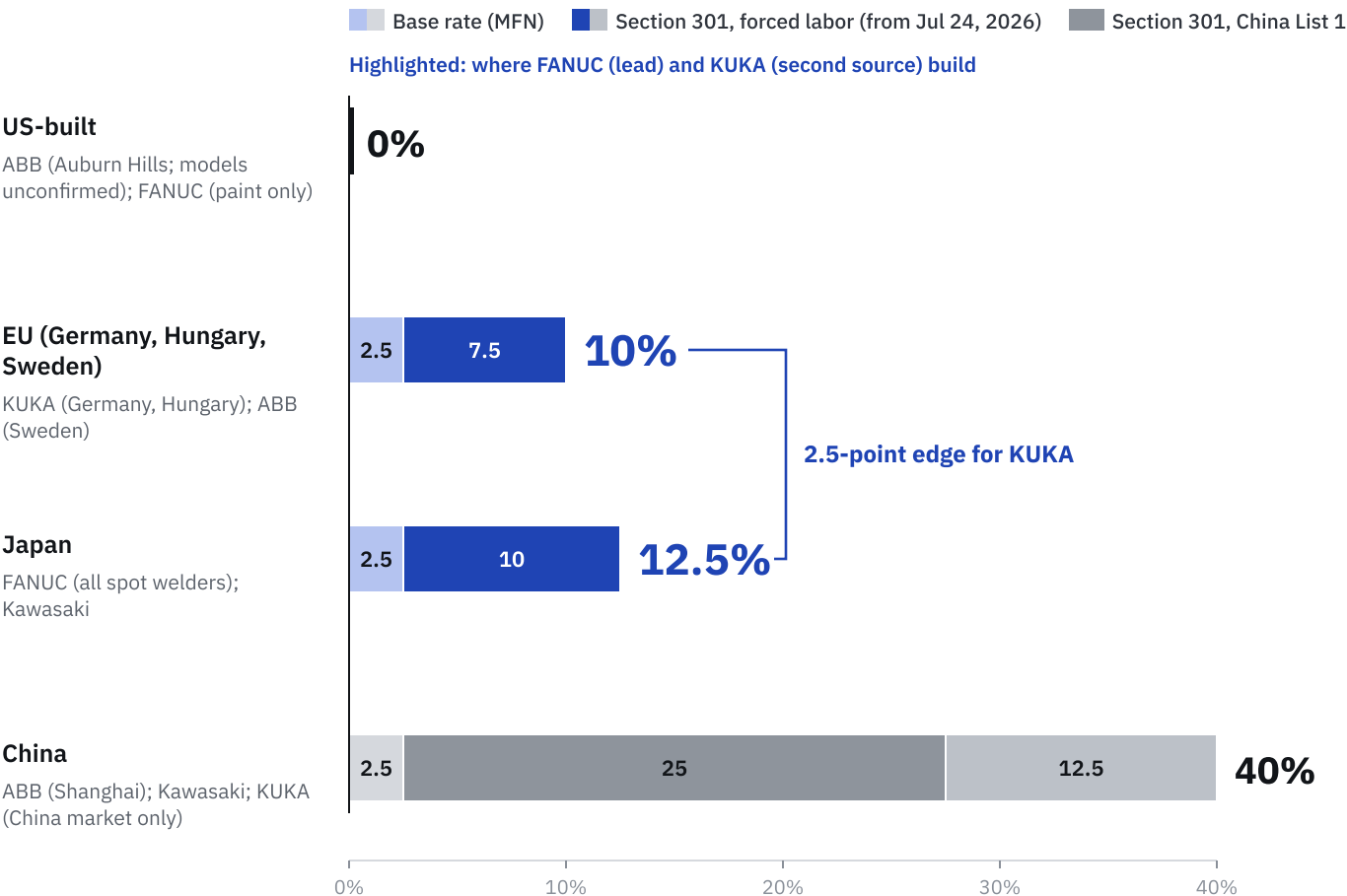
Who can support a US body shop? None of the five publishes a US field-engineer count; ask in the RFQ.^{5,42}

Japan-built robots pay 12.5% US duty, EU-built 10%, China-built 40%.

EXHIBIT 7

Duty runs from 0% (US-built) to 40% (China-built).

US import duty on industrial robots (HTS 8479.50.00⁶²), at October 9, 2026 · % of customs value



Note: Not yet priced: a Section 232 robotics probe and a Section 301 excess-capacity probe covering Japan and EU.^{17,4}

Note: Yaskawa: origin of US-bound robots unstated; Japan-built would pay 12.5%.^{3,4}

Left out: Switzerland (12.5%) and Mexico (0% under USMCA): no ranked maker ships from either.⁴

Source: fanuc.co.jp [1]; kuka.com [2, 29]; motoman.com [3]; ustr.gov [4]; abb.com [14, 60]; bis.gov [17]; kawasakirobotics.com [20, 61]; ifr.org [24]; fanucamerica.com [43]; govinfo.gov [59]; hts.usitc.gov [62]

What import duty does each origin carry? Duty follows where a robot is built, not who owns the maker.⁴

FANUC posts records; ABB is mid-sale and Yaskawa's robot profit fell 43.3%.

EXHIBIT 8

FANUC's results are strongest; the others each carry a change to watch.

Ownership, results and what to watch, by maker

Strongest results Change to watch

MAKER	OWNER	ROBOT BUSINESS	LATEST SIGNAL	WATCH BEFORE OCTOBER 2027
FANUC	FANUC Corporation, Japan ¹	¥378.6bn division sales, FY2025 (44.1% of group) ⁶³	Robot sales +18.7%, Q1 FY2026; group forecast raised to ¥948.1bn ⁶⁵	Tariff surcharge, weighed in April 2025 ¹
KUKA	Midea Group (China), 100% since 2022 ¹⁶	€1,010.7m Robotics, FY2025, excluding China (2024: €1,092.0m) ²⁹	Group EBIT margin 1.5%, FY2025 (2024: 2.0%) ²⁹	509 Augsburg job cuts by end-2026 ⁶⁶
YASKAWA	Yaskawa Electric Corporation, Japan ⁶⁷	¥247.0bn revenue, FY2025 (+4.0%) ⁶⁷	Robotics operating profit -43.3%, 1H FY2026 ⁶⁴	Chairman also President from May 27, 2026; Franklin plant: no start date ^{68,3}
ABB	ABB Ltd, selling Robotics to SoftBank (\$5.375bn enterprise value) ⁶⁹	\$2.3bn revenue, FY2024 ⁶⁹	Operational EBITA margin 12.1%, FY2024 ⁶⁹	Sale expected to close H2 2026; separate post-sale support emails listed ^{15,58}
Kawasaki	Kawasaki Heavy Industries, Japan ²¹	¥92.9bn revenue, FY2025 ²¹	Car-robot sales ¥36.8bn, down ¥5.0bn ²¹	Forecast car-robot rebound to ¥46.0bn in FY2026 ²¹

Note: Currencies and fiscal years not converted. ABB has reported Robotics as discontinued operations since Q4 2025.⁷⁰

Note: Kawasaki's car-robot figures are from a separate split incl. intercompany sales, not part of ¥92.9bn.²¹

Left out: Comau, Nachi and OTC DAIHEN: researched, not ranked (Appendix A, p. 22).

Source: fanuc.co.jp [1, 63, 65]; motoman.com [3]; abb.com [15, 58, 69, 70]; kuka.com [16, 29]; global.kawasaki.com [21]; yaskawa-global.com [64, 67, 68]; apps.eurofound.europa.eu [66]

Who is financially stable, and what could change before delivery?

FANUC posted record FY2025 sales of ¥857.8bn; each of the other four carries a change to watch (highlighted) that could reach this order.⁶³

FANUC

FANUC America Corporation (FANUC Corporation, Japan) · fanucamerica.com

Lead

Rank 1 of 5

Widest US support, named US body-shop references, largest published capacity. But spot welders are Japan-built (12.5% duty), FANUC weighed a tariff surcharge, and its new Michigan plant is due late 2027, after this order. Get allocation and a capped landed price in writing. ^{6,10,12,1,4,53}

¥857.8bn ⁶³

Group net sales (record)
FY2025 (Apr 2025–Mar 2026)

¥183.8bn ⁶³

Operating income
FY2025

¥378.6bn ⁶³

Robot division sales
FY2025 · 44.1% of group

+18.7% ⁶⁵

Robot sales growth
Q1 FY2026 (Apr–Jun 2026), year on year

¥948.1bn ⁶⁵

Full-year sales forecast
FY2026, issued Jul 31, 2026 · raised from ¥909.6bn

~10,000 a month ¹²

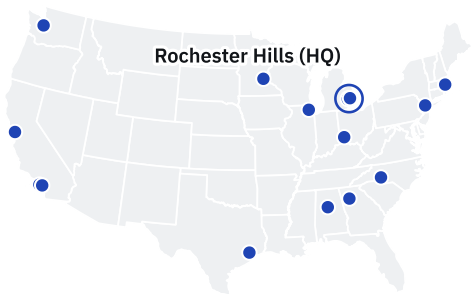
Group robot capacity
c. 2022 · third-party estimate

19 ⁶

US offices
2026

6,000+ robots ⁷

Quick-delivery warehouse,
Auburn Hills
Jul 2024



US FOOTPRINT

Michigan: HQ and paint-robot plant (Rochester Hills), warehouse and FANUC Academy (Auburn Hills), Pontiac site due late 2027. ^{6,43,7,53}

SPOT-WELDING ROBOTS

R-2000iC/210F: 210 kg payload, 2,655 mm reach. ⁷¹

BODY-IN-WHITE REFERENCES

Volkswagen, Chattanooga, TN 2020

About 600 more body-shop and battery robots; part of a 1,400-robot order ¹⁰

General Motors, Orion Assembly, MI 2015

Predictive-maintenance pilot in the body shop; strategic GM supplier ³²

General Motors (Cadillac CT6)

R-2000 robots spot-weld CT6 bodies (FANUC case example) ⁷³

BMW Group, German and international plants 2023

3,500-robot framework, mainly body shop; first installed end-2019 ⁸

Volkswagen Group, Wolfsburg, Bratislava, Ingolstadt, Győr 2022-2023

About 1,300 robots, including ID.3 body construction ¹²

WATCH-OUTS

- Japan-built spot welders: 12.5% duty ^{1,4}
- Weighed a tariff surcharge; calls the yen unpredictable ¹
- Capacity figure: third-party, c. 2022; no US lead times ^{12,7}

RECENT NEWS

- Sep 3, 2026** New R-2000 E Series robots shown spot-welding at IMTS ⁷²
- Mar 24, 2026** \$90M, 840,000 sq ft Pontiac site, due late 2027 ⁵³
- Apr 23, 2025** All but paint robots built in Japan; tariff surcharge considered ¹

COMPANY CHANNELS

- Sales** 888-FANUC-US (888-326-8287)
- RFQ page** www.fanucamerica.com/contact
- Service** 1-888-FANUC-US, Technical Support Call Center, 24/7; fieldservice@fanucamerica.com
- US address** 3900 W Hamlin Rd, Rochester Hills, MI 48309
- LinkedIn** linkedin.com/company/fanuc-america-corporation/

Company channels only. Named contacts are in the portal. ⁶

The only one of the five with its own US body shop (Toledo, 285 robots). EU origin: 10% duty. But China's Midea has owned it outright since 2022, and its Augsburg home base is cutting 509 jobs. Clear ownership with your program first.^{11,4,16,66}

€3,897.2m²⁹

Group sales
FY2025

1.5%²⁹

EBIT margin
FY2025 · 2024: 2.0%

€1,010.7m²⁹

Robotics revenue (excl. China)
FY2025 · 2024: €1,092.0m

€867.1m²⁹

Systems revenue (BIW, turnkey lines)
FY2025

€3,272.8m²⁹

Order backlog
Dec 31, 2025

2,583¹⁶

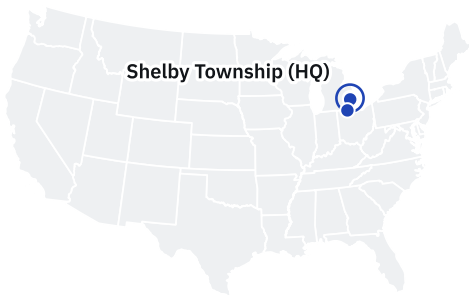
US employees, all units
Dec 31, 2025

285¹¹

Toledo body-shop robots
Jul 2026

500,000+⁷⁴

Robots in use worldwide
2026



US FOOTPRINT

HQ, 24/7 service and training in Shelby Township, MI; KUKA Systems, Sterling Heights; Toledo body shop. No US robot plant.^{45,39,46,29,11,2}

SPOT-WELDING ROBOTS

KR QUANTEC nano: 120–180 kg payload, 2,100 mm reach.⁷⁵

BODY-IN-WHITE REFERENCES

Stellantis (Jeep), Toledo, OH 2026

KUKA-owned: 285 robots, 300+ bodies a day; Wrangler since 2006¹¹

BMW, International plants (not named) 2020

Framework: about 5,000 robots, mainly body-in-white⁹

Mercedes-Benz 2020

Several body-in-white lines, several hundred robots⁷⁶

Volkswagen, Navarra, Spain 2024

Framework: up to 700 robots over about two years⁷⁷

Ford Otosan, Kocaeli, Turkey 2022

700+ robots for new commercial-vehicle bodies⁷⁸

WATCH-OUTS

- Owned 100% by Midea (China) since 2022¹⁶
- 1.5% EBIT margin; Robotics revenue down²⁹
- 509 Augsburg job cuts by end-2026⁶⁶

RECENT NEWS

- Jul 20, 2026** Automation management platform live at the Toledo body shop¹¹
- Nov 15, 2025** 560 Augsburg job cuts announced (later 509)⁶⁶
- Jul 9, 2025** US automaker orders 12 more friction stir welding cells⁷⁹
- Apr 30, 2025** New group CEO, effective July 1, 2025⁸⁰

COMPANY CHANNELS

- Sales** +1 866 873 5852 (main line)
- RFQ page** www.kuka.com/en-us/company/contact/contact-form
- Service** +1 (800) 459-6691, 24/7; KUKA Systems North America +1 (586) 795-2000 ext. 9
- US address** 51870 Shelby Parkway, Shelby Township, MI 48315
- LinkedIn** linkedin.com/company/kukaglobal

Company channels only. Named contacts are in the portal.⁴⁵

YASKAWA

Yaskawa America, Inc., Motoman Robotics Division (Yaskawa Electric Corporation, Japan) · motoman.com

Fallback

Rank 3 of 5

Yaskawa has the second-largest published capacity, with a new factory meant to add half again, and well-documented US service. Body-in-white is the gap: one named reference, Honda Swindon, UK, 2003. Robot profit fell 43.3% in the latest half.^{13,27,18,57,19,64}

¥247.0bn⁶⁷

Robotics revenue

FY2025 (Mar 2025–Feb 2026) · +4.0%

¥20.4bn⁶⁷

Robotics operating profit

FY2025 · –14.0%

¥5.97bn⁶⁴

Robotics operating profit

1H FY2026 (Mar–Aug 2026) · –43.3%

¥251.0bn²⁷

Robotics revenue forecast

FY2026, revised Oct 2026 · raised from ¥240.0bn

5,400 a month¹³

Group robot capacity

Oct 2023

¥78.1bn²⁷

Americas revenue, all segments

1H FY2026 · +26.2%

90+⁵⁷

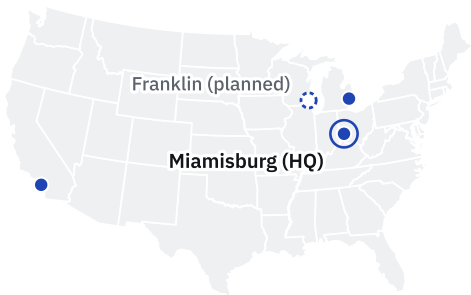
US training robots

2026

99.2%¹⁸

First-time fix rate

2026, self-reported



US FOOTPRINT

Miamisburg, OH HQ (parts, training); centers in Rochester Hills, MI and Irvine, CA; first US robot plant: no start date.^{47,3}

SPOT-WELDING ROBOTS

SP series, 80–235 kg; SP210: 210 kg payload, 2,702 mm reach.⁸¹

BODY-IN-WHITE REFERENCES

Honda (Honda of the UK Manufacturing), Swindon, UK 2003

About 130 more robots, taking the site to 200; mostly spot welding¹⁹

WATCH-OUTS

- One named BIW reference: Honda Swindon, 2003¹⁹
- Robot profit –43.3%, partly from a Japan ERP disruption⁶⁴
- Origin of US-bound robots not stated³

RECENT NEWS

- Oct 9, 2026** 1H FY2026: robotics revenue ¥118.4bn (–0.7%), profit –43.3%⁶⁴
- Aug 2026** Record 2025 Net Promoter Score of 75 (self-reported)⁸²
- Apr 10, 2026** Chairman also becomes President from May 27⁶⁸

COMPANY CHANNELS

- Sales** 937-847-6200 (Motoman Robotics Division); Yaskawa America corporate 800-YASKAWA
- RFQ page** www.motoman.com/en-us/products/robots/sales-quote
- Service** 937-847-3200 (24 hours)
- US address** 100 Automation Way, Miamisburg, OH 45342
- LinkedIn** linkedin.com/companies/motoman

Company channels only. Named contacts are in the portal.⁸³



ABB Robotics, ABB Inc. in the US (ABB Ltd, Switzerland; being sold to SoftBank) · abb.com/global/en/areas/robotics

Watch

Rank 4 of 5

ABB's robots, Michigan-built since 2015, could avoid duty, but it has not said which spot-welding models. Its sale to SoftBank should close in H2 2026.^{14,15}

\$2.3bn⁶⁹

Robotics revenue
FY2024

12.1%⁶⁹

Operational EBITA
margin
FY2024

\$5.375bn⁶⁹

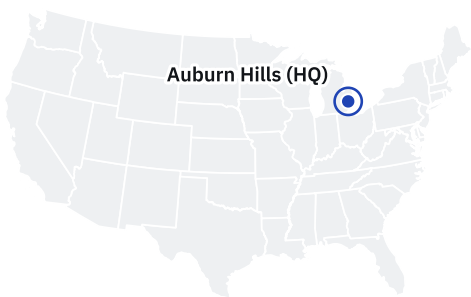
SoftBank deal, enterprise
value
Oct 8, 2025

~350¹⁴

Auburn Hills staff
Mar 2023

3,000+ a year⁴⁹

Auburn Hills training
capacity
2024



US FOOTPRINT

Auburn Hills, MI: US HQ, robot plant, training center.⁴⁹

SPOT-WELDING ROBOTS

IRB 6710–6740 family, marketed for spot welding: 150–310 kg payload, 2.5–3.2 m reach.⁸⁴

BODY-IN-WHITE REFERENCES

Volvo Cars, Torslanda, Sweden; Daqing, China 2023
1,300+ robots for next-generation EVs, including spot welding³³

BMW Group, Regensburg, Leipzig; Tiexi, China 2013
2,400 robots over three years, mostly handling, some spot welding³¹

Great Wall Motor, Xushui, China 2014
600+ robots, SUV body shop⁸⁵

WATCH-OUTS

- SoftBank sale: separate post-sale support emails already listed^{15,58}
- No US service hours or counts published^{58,42}

RECENT NEWS

- Jul 16, 2026** SoftBank sale expected to close H2 2026; about \$4.8bn net proceeds¹⁵
- Jun 25, 2026** Named a Ford 2026 Supplier of the Year³⁸
- Mar 12, 2026** EU clears the SoftBank deal⁸⁶

COMPANY CHANNELS

- Sales** +1 615 237 6360 / toll-free 800 215 0998 (US contact center) · us-robotics.contact.center@abb.com
- RFQ page** www.abb.com/global/en/areas/robotics/contact-us
- Service** +1 800 215 0998; robotics.support@us.abb.com
- US address** Auburn Hills, Michigan

Company channels only. Named contacts are in the portal.⁵⁸



Kawasaki Robotics (USA), Inc. (Kawasaki Heavy Industries, Japan) · kawasakirobotics.com

Watch

Rank 5 of 5

Builds in Japan; stocks robots at Wixom, MI. Car-robot business is small (¥36.8bn), and delivery dates are estimates.^{20–22}

¥92.9bn²¹

Robotics revenue
FY2025 (to Mar 2026)

¥36.8bn²¹

Car-robot sales (incl.
intercompany)
FY2025 · –¥5.0bn

¥46.0bn²¹

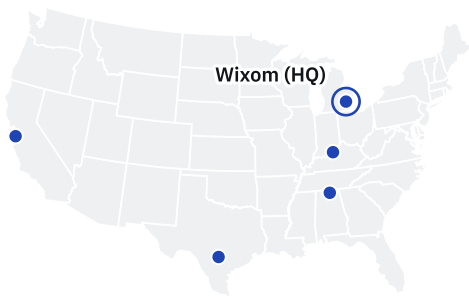
Car-robot forecast
FY2026

¥32.1bn⁶¹

Americas robot sales
FY2024

5⁴¹

US locations
as listed on its website · HQ,
four service offices



US FOOTPRINT

Wixom, MI: HQ, training, robot stock. Service offices in CA, KY,
AL, TX.^{50,20}

SPOT-WELDING ROBOTS

BX200X: 200 kg payload, 3,412 mm reach; B series for high-density
body shops.⁸⁷

BODY-IN-WHITE REFERENCES

Toyota 2019

Welding, paint and assembly robots in Toyota factories;
Superior Award³⁷

Unnamed American carmaker 1989

A few hundred spot-welding robots after a year's tests³⁴

WATCH-OUTS

- Standard terms: delivery dates are estimates²²
- Toyota reference names no US plant³⁷

RECENT NEWS

Aug 10, 2026 KHI raises FY2026 business profit
forecast to ¥180bn⁸⁸

Jun 16, 2026 Automate 2026: new RL030N robot;
Ford F-150 door-sealant demo⁸⁹

COMPANY CHANNELS

Sales +1-248-446-4100 · info@kri-us.com

RFQ page kawasakirobotics.com/inquiry/

Service (248) 446-4271 (24-hour
support hotline)

US address 28140 Lakeview Drive, Wixom, MI 48393

LinkedIn linkedin.com/company/kawasaki-robotics

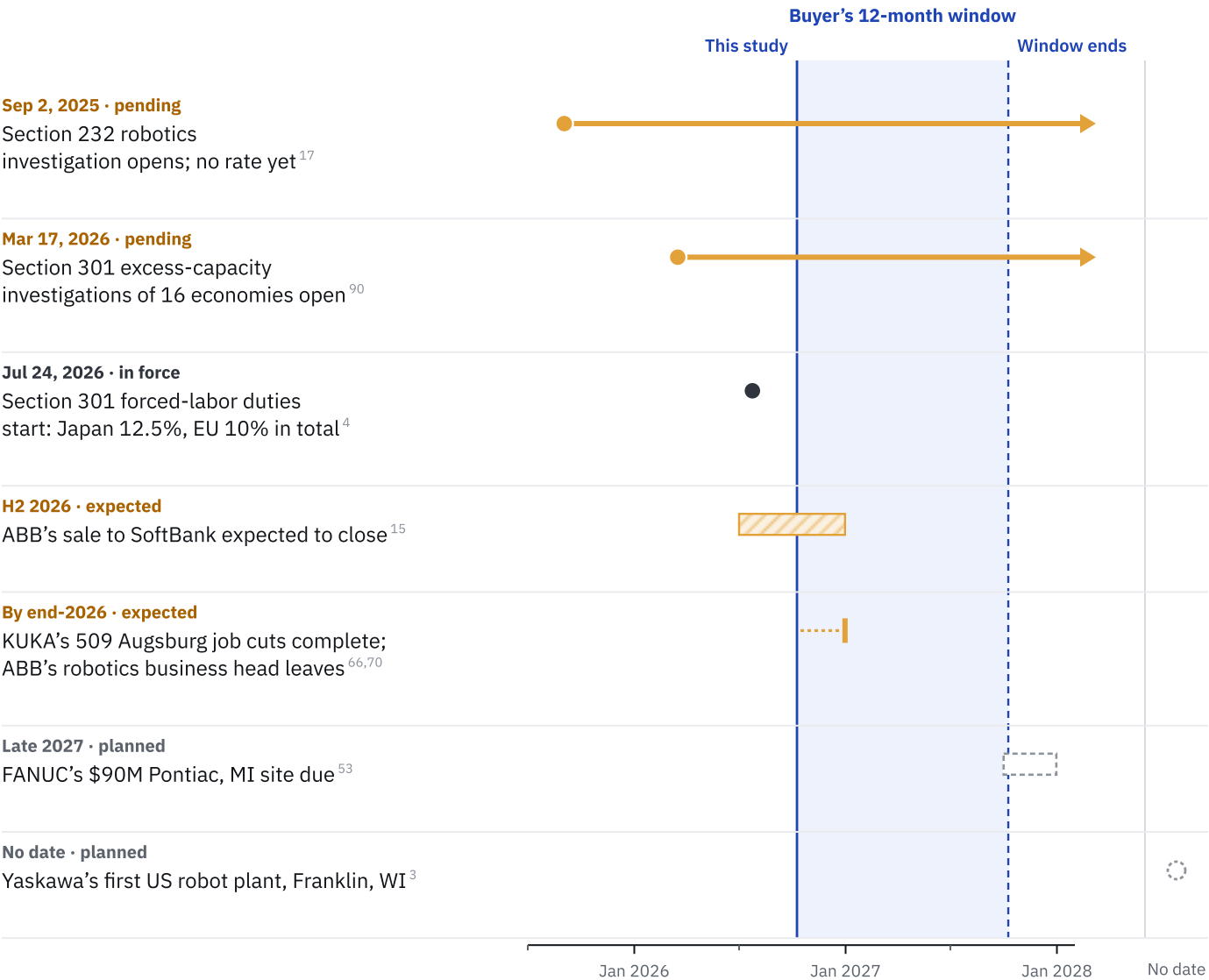
Company channels only. Named contacts are in the portal.⁵⁰

Two tariff rulings and ABB’s sale could land inside the window.

EXHIBIT 9

New US plants come after the window; tariff rulings may land inside it.

Events affecting supply, duty or ownership



Note: FANUC describes Pontiac only as space for a potential US robot-building expansion.⁵³
Source: this study's run record; motoman.com [3]; ustr.gov [4]; abb.com [15, 70]; bis.gov [17]; fanucamerica.com [53]; apps.eurofound.europa.eu [66]; federalregister.gov [90]

What could go wrong, and how do we manage it? Both tariff probes remain open; Pontiac is due late 2027 and Franklin has no date.^{17,4,53,3}

Six risks, each with a contract or process fix.

EXHIBIT 10

Risk, who it affects, mitigation

RISK	AFFECTS	MITIGATION
1 Duty rises mid-program: Section 232 robotics and Section 301 excess-capacity probes are undecided. ^{17,92,4}	All imported robots	Price at 12.5% (Japan) and 10% (EU), with a tariff-change clause. ⁴
2 Price creep: FANUC has weighed a tariff surcharge and calls the yen unpredictable. ¹	FANUC	Fixed US-dollar landed price; capped surcharge.
3 Allocation squeeze (our inference): FANUC's Americas robot sales rose 20.9% y/y in Apr–Jun 2026. ⁶⁵	FANUC	Written monthly allocation, with delivery penalties.
4 Chinese ownership: Midea has owned 100% of KUKA since 2022. ¹⁶	KUKA	Check program and customer restrictions before award.
5 Owner change: ABB's sale to SoftBank due H2 2026; separate post-sale support emails already listed. ^{15,58}	ABB	Re-bid after closing, with warranty and support continuity terms.
6 Weak fallback: Yaskawa's robot profit fell 43.3%, partly after a Japan ERP disruption. ⁶⁴	YASKAWA	Ask for proof that shipments have recovered.

Source: fanuc.co.jp [1, 65]; ustr.gov [4]; abb.com [15, 58]; kuka.com [16]; bis.gov [17]; yaskawa-global.com [64]; ccianet.org [92]

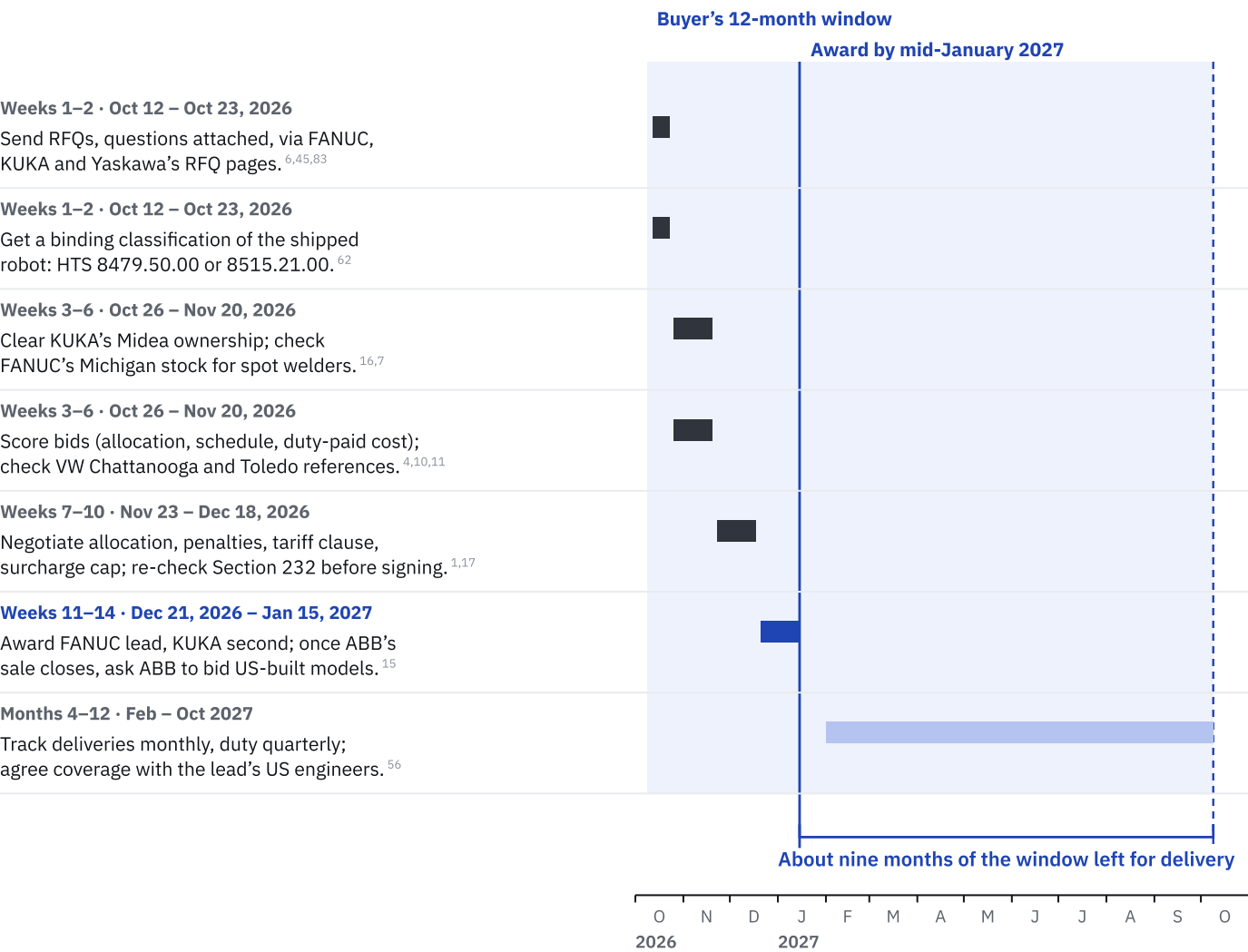
NEXT STEPS

Award by mid-January 2027, leaving about nine months for delivery.

EXHIBIT 11

Seven steps, from RFQ to delivery tracking.

Week ranges count from Monday, October 12, 2026



Note: Dates are our calendar arithmetic, not supplier lead times.
Source: this study’s run record; fanuc.co.jp [1]; ustr.gov [4]; fanucamerica.com [6, 7, 56]; auto-innovations.net [10]; kuka.com [11, 16, 45]; abb.com [15]; bis.gov [17]; hts.usitc.gov [62]; motoman.com [83]

What should the buyer do, and when?

No source gives lead times at this size, so bids decide how much window remains.⁹¹

Twenty-three questions for the RFQ, by supplier.

Public sources could not close these gaps; each answer feeds the award.

All bidders

3 questions

- 1** Price per robot with controller, gun and dress pack; landed cost at today's duty.
Why: No reputable published list price found.⁹³
- 2** Delivery lead time for an order this size.
Why: No reputable source covers large 2025–26 orders.⁹¹
- 3** Your HTS classification for robot, controller and gun.
Why: Sets the duty; a binding ruling is advised.⁶²

FANUC

5 questions

- 4** How many spot welders will you allocate us each month, from which plant?
Why: No US lead times; capacity: c. 2022 third-party estimate.^{7,12}
- 5** Does Auburn Hills quick-delivery stock include spot welders?
Why: Cites space for 6,000+ robots; models not stated.⁷
- 6** Will you add a tariff surcharge, and cap it by contract?
Why: Considered a tariff-linked surcharge in April 2025.¹
- 7** How many field engineers cover our region, with what committed on-site response time?
Why: No published US engineer or service-center counts.⁵
- 8** Will Pontiac, MI build spot welders once it opens in late 2027?
Why: Described only as space for potential expansion.⁵³

KUKA

4 questions

- 9** Which plant, Germany or Hungary, builds our robots, with what committed delivery slots?
Why: No published US capacity or lead times.⁹
- 10** How much US spare-parts stock, and how many US engineers, would support us?
Why: US service pages give no such counts.³⁹
- 11** Does Midea's ownership restrict supply to our program or customers? Document it.
Why: Midea has owned 100% since 2022.¹⁶
- 12** Will the Augsburg job cuts affect our delivery, and who leads our US account?
Why: 509 job cuts by end-2026; named US executives date from 2022.^{66,80}

YASKAWA

4 questions

- 13** Where are the SP-series robots you would ship us built?
Why: US robots are imported; origin not stated.³
- 14** Which US body shops run Motoman spot welders, and how many?
Why: Only body-in-white reference found: Honda Swindon, UK (2003).¹⁹
- 15** Has the Japan ERP disruption that hit 1H FY2026 shipments cleared?
Why: Robot operating profit fell 43.3%, partly after the ERP rollout.⁶⁴
- 16** How many US field technicians, and when does Franklin, WI start building?
Why: Neither is published.^{18,3}

ABB

4 questions

- 17** Which IRB 67xx spot welders does Auburn Hills build, and how many a year?
Why: No published capacity or model list.¹⁴
- 18** Is US technical support staffed 24/7?
Why: Promises support 'anytime, anywhere'; states no hours.⁵⁸
- 19** How will contracts, warranty and support change when the SoftBank sale closes?
Why: Already lists separate 'after Day 1' support emails.⁵⁸
- 20** Which US body shops use ABB spot welders?
Why: Published body-shop wins: Europe and China.³³

Kawasaki

3 questions

- 21** Will you commit to delivery dates with penalties?
Why: Standard terms treat delivery dates as estimates.²²
- 22** Can you supply 1,000 body-in-white robots in 12 months, from Japan or China?
Why: No published capacity; also builds robots in China.^{21,61}
- 23** Which US plants run Kawasaki spot welders?
Why: The Toyota reference names no plant.³⁷

How the scorecard was scored

Each maker scores 0–4 per criterion against these rules; p. 21 shows the evidence.

SCORECARD RULES

Rule for each score, highest first

CRITERION	4	3	2	1	0
US support ×2 The buyer asked for a strong US support base by name.	24/7 US line, 10+ US sites serving customers, a US training center and US spare-parts stock.	24/7 or 24-hour US line, 3–9 US sites serving customers and a US training center.	US service contact and US training, but no stated 24/7 line or fewer than 3 US sites.	US sales or contact office only; no US service line or training published.	Publishes nothing on US support.
Body-shop record ×2 The robots are for a BIW line, which the buyer named.	A named US body shop runs its robots AND a 1,000+-robot body-shop order or framework, 2016 or later.	Only one of the two: a named US body shop, or a 1,000+-robot body-shop order from 2016 on.	A named body-shop plant outside the US, 2016 or later, under 1,000 robots.	Body-shop references only from before 2016, or with no plant named.	Publishes no body-shop reference.
Capacity ×2 The buyer's hard ask: 1,000 robots inside 12 months.	Published capacity of 5,000+ robots a month (2021 or later) AND a US warehouse for 1,000+ quick-delivery robots.	Published capacity of 5,000+ robots a month, 2021 or later: five times this order.	No current capacity figure, but a US robot plant or a quantified US robot stock.	No current capacity; only revenue, a pre-2021 figure, or a figure for a plant that does not ship to the US.	Publishes nothing on output, capacity, US plant or stock.
Import duty ×1 Sets landed cost and is priced into bids; it does not decide delivery.	Spot welders confirmed US-built: 0% duty.	Builds robots in the US, but which spot-welding models is unconfirmed: 0% possible.	US-bound robots EU-built: 10% duty.	US-bound robots Japan-built: 12.5% duty.	US-bound robots China-built: 40% duty.
Stability ×1 A risk managed through contract terms; the buyer did not ask about it.	Same owner; robot sales at a record or growing and the forecast raised, with no 25%+ profit fall, sub-2% margin or job cuts.	Same owner; robot sales flat or down under 25%, with no 25%+ profit fall, sub-2% margin or job cuts.	Same owner, but robot profit down 25%+, group margin under 2%, or job cuts announced.	A sale of the robot business closing inside the 12-month window.	Publishes no robot-business results.

Weighted total: ×2 and ×1 as tagged; maximum 32.

If nothing is published: the criterion scores 0, except import duty (origin not published: scored at the home country's rate and flagged for the RFQ).

US support: Sites = US sites serving robot customers, as mapped on the cover, p. 1; FANUC's 19 US offices sit in 17 cities. A US body shop the maker runs counts as a site serving customers. Self-reported fix rates and satisfaction scores add no points.

Body-shop record: A body-shop order is one whose robots are mainly for body-in-white or carry spot-welding packages. A supplier award is not a plant reference.

Capacity: Published figures are group-wide and cover all robot types; monthly spot-welder allocation to a US order is an RFQ question for every bidder. Past orders are scored under Body-shop record only, so the same evidence is not counted twice.

Import duty: Duty follows where a robot is built, not who owns the maker (Exhibit 7, p. 9).

Stability: Who owns the maker (e.g. KUKA's Chinese owner) is a gate for the buyer's program, not a stability score.

What is behind each score

SCORECARD EVIDENCE

Score, the facts behind it and its numbered sources (Appendix B, p. 24)

	1 LEAD FANUC	2 SECOND SOURCE KUKA	3 FALLBACK YASKAWA	4 WATCH ABB	5 WATCH  Kawasaki
US support ×2	4 8 pts 24/7 call center; 19 US offices in 12 states; FANUC Academy; Michigan parts warehouse. ⁵⁻⁷	3 6 pts 24/7 hotline; KUKA College; HQ in Shelby Township, systems unit in Sterling Heights, Toledo body shop. ^{11,29,39,45,46}	3 6 pts 24-hour hotline and 24/7 technician dispatch; Ohio HQ plus Michigan and California centers; 3 training sites. ^{18,40,47,57}	2 4 pts Q18 US service line, hours unstated; Auburn Hills, MI training center for 3,000+ a year. ^{49,58}	3 6 pts 24-hour hotline; Wixom, MI HQ with training center and parts stock, plus four US service offices. ^{20,41,50,51}
Body-shop record ×2	4 8 pts 3,500-robot BMW body-shop framework; US body shops at VW Chattanooga and GM Orion. ^{8,10,32}	4 8 pts Runs its own 285-robot Jeep body shop in Toledo, OH; BMW body-shop framework for about 5,000. ^{9,11}	1 2 pts Q14 Only named body-shop reference: about 130 robots at Honda Swindon, UK, 2003; names no US shop. ¹⁹	3 6 pts Q20 1,300+ Volvo robots, spot-welding and other packages (2023, Sweden, China); names no US body shop. ^{33,38}	1 2 pts Q23 Welds in unnamed Toyota plants (2019); ‘a few hundred’ spot welders, unnamed US carmaker, 1989. ^{34,37}
Capacity ×2	4 8 pts Q4 Q5 About 10,000 robots a month group-wide (third-party estimate, c. 2022); Michigan space for 6,000+ quick-delivery robots. ^{7,12}	1 2 pts Q9 Publishes no capacity for US supply; its ~30,000-a-year Shunde, China plant sells in China. ^{28,29}	3 6 pts 5,400 robots a month group-wide (Oct 2023); Factory No. 5, aimed at 1.5x that, now running. ^{13,27}	2 4 pts Q17 Builds robots in Auburn Hills, MI since 2015 (~350 staff, 2023); publishes no unit capacity. ¹⁴	1 2 pts Q22 Latest unit figure: 7,000 car robots a year, Suzhou, China (2017 forecast); delivery dates are estimates. ^{22,30}
Import duty ×1	1 1 pt Spot welders built in Japan: 12.5% duty; Pontiac, MI site due late 2027, after this order. ^{1,4,44,53}	2 2 pts Q9 Likely ships from Germany or Hungary at 10% duty; its China plant sells in China. ^{2,4,29}	1 1 pt Q13 US robots are imported, origin unstated; Japan origin would pay 12.5% (RFQ question). ^{3,4}	3 3 pts Q17 Builds robots in Michigan (0% duty), spot-welding models unconfirmed; Sweden-built pay 10%, China-built 40%. ^{4,14,59,60}	1 1 pt Q22 Robots built in Japan, not the US: 12.5% duty; KHI also runs a China robot plant. ^{4,20,61}
Stability ×1	4 4 pts Record FY2025 sales of ¥857.8bn; robot sales up 18.7% in Q1; forecast raised to ¥948.1bn. ^{1,63,65}	2 2 pts EBIT margin 1.5% (2024: 2.0%); Robotics revenue ex-China down to €1,010.7m; 509 Augsburg job cuts. ^{16,29,66}	2 2 pts Robotics operating profit –43.3% in 1H FY2026, partly from Japan ERP disruption; FY2025 robot revenue +4.0%. ^{64,67}	1 1 pt Robot division being sold to SoftBank (\$5.375bn), closing expected H2 2026; separate post-sale support emails listed. ^{15,58,69}	3 3 pts Car-robot sales fell ¥5.0bn to ¥36.8bn in FY2025; ¥46.0bn forecast for FY2026; same owner. ²¹
Weighted total	29 8+8+8+1+4	20 6+8+2+2+2	17 6+2+6+1+2	18 [†] 4+6+4+3+1	14 6+2+2+1+3

Key: score, then weighted points. Q4 after a score: the score turns on open question 4 (p. 19), a fact the maker does not publish or confirm.

† ABB outscores Yaskawa by a point even with the sale scored in; it stays on Watch until the sale closes (H2 2026).¹⁵

How the study was run

On October 9, 2026, 120 research agents read 873 web pages in 9 minutes. A second agent checked 382 claims against sources, correcting or removing 70. Third-party, self-reported and derived figures are labeled.

EXHIBIT 12

35 companies screened to 5 ranked makers.

Companies at each stage



Source: this study's run record

EXHIBIT 13

All 35 companies, and why each was kept or dropped.

Grouped by how far each went

COMPANY	TYPE	HOME	REASON
RESEARCHED IN DEPTH (8)			
FANUC America	robot maker	Japan	#1 Lead: widest US support, largest published capacity. ^{6,12}
KUKA Robotics Corporation	robot maker	Germany	#2 Second source: runs a US body shop (Toledo). ¹¹
Yaskawa Motoman	robot maker	Japan	#3 Fallback: large capacity, thin body-shop record. ^{13,19}
ABB Robotics	robot maker	Switzerland	#4 Watch: builds in Michigan; SoftBank sale pending. ^{14,15}
Kawasaki Robotics (USA)	robot maker	Japan	#5 Watch: Japan-built; delivery dates estimated. ^{20,22}
Comau	BIW line integrator	Italy	Unranked: Turin-built robots; US sales via distributors. ^{94,95}
Nachi Robotic Systems	robot maker	Japan	Unranked: no named BIW customers; robot sales ¥25.25bn (FY2025). ^{96,97}
OTC DAIHEN	robot maker	Japan	Unranked: arc-welding specialist; no US spot welders listed. ⁹⁸
FIT THE BRIEF, NOT RESEARCHED SEPARATELY (2)			
KUKA Systems North America	BIW line integrator	Germany	In KUKA's profile; runs Toledo body shop. ¹¹
Valiant TMS	BIW line integrator	Canada	Turnkey BIW integrator in Michigan; not researched. ⁹⁹

Source: this study's run record; fanucamerica.com [6]; kuka.com [11]; metalworkingnews.info [12]; fukuoka-now.com [13]; abb.com [14, 15]; emerald.com [19]; kawasakirobotics.com [20, 22]; comau.com [94, 95]; nachirobotics.com [96]; nachi-fujikoshi.co.jp [97]; daihen-usa.com [98]; michiganbusiness.org [99]
Continued on the next page.

EXHIBIT 13 (CONTINUED)

All 35 companies, and why each was kept or dropped.

Grouped by how far each went

COMPANY	TYPE	HOME	REASON
DID NOT FIT THE BRIEF (25)			
HD Hyundai Robotics	robot maker	South Korea	Spot-capable; new US unit, so far shipbuilding-focused. ¹⁰⁰
Panasonic Connect (Welding & Robotics)	robot maker	Japan	US pages: arc-welding robots only. ¹⁰¹
Staubli Robotics	robot maker	Switzerland	Strong US base; no BIW spot welding. ¹⁰²
Estun Automation	robot maker	China	No US robot office found. ¹⁰³
EFORT Intelligent Equipment	robot maker	China	Auto-welding robots; no North American presence found. ¹⁰⁴
SIASUN Robot & Automation	robot maker	China	Spot-welding package; no US office found. ¹⁰⁵
Hirotec America	BIW line integrator	Japan	GM, Ford, Toyota closure lines; not full BIW. ¹⁰⁶
Fori Automation (Lincoln Electric)	BIW line integrator	United States	Welding/assembly lines; BIW scale unconfirmed. ¹⁰⁷
JR Automation (Hitachi)	BIW line integrator	United States	Large integrator; body-shop scale unconfirmed. ¹⁰⁸
Krause Automation (ex-thyssenkrupp Automation Engineering, Agile Robots)	BIW line integrator	Germany	Powertrain/battery focus, not BIW. ¹⁰⁹
FFT Produktionssysteme	BIW line integrator	Germany	US site unconfirmed; North American HQ in Mexico. ¹¹⁰
JEE Technology	BIW line integrator	China	US subsidiary listed, no city found. ¹¹¹
Genesis Systems (IPG Photonics)	other	United States	Welding integrator; spot welding no longer listed. ¹¹²
Applied Manufacturing Technologies (AMT)	other	United States	FANUC-authorized integrator; no body-shop work found. ¹¹³
Durr Systems	other	Germany	Paint and final assembly, not BIW welding. ¹¹⁴
EDAG	other	Germany	Body engineering and planning, not robots. ¹¹⁵
Lincoln Electric / Wolf Robotics	welding equipment	United States	Heavy-fabrication arc-welding cells, not spot welding. ¹¹⁶
CLOOS Robotic Welding (Estun)	robot maker	Germany	Arc-welding robots; Schaumburg experience center. ¹¹⁷
ARO Welding Technologies	welding equipment	France	Robotic spot-weld guns; US branch, Chesterfield Township. ¹¹⁸
Obara Corp. USA	welding equipment	Japan	Spot-welding guns; US plant in Erlanger, Kentucky. ¹¹⁹
CenterLine (Windsor)	welding equipment	Canada	Weld guns and cells; plant across from Detroit. ¹²⁰
NIMAK (TUNKERS Group)	welding equipment	Germany	Robot weld guns; US base in Greer, SC. ¹²¹
WTC (Welding Technology Corp.)	welding equipment	United States	Resistance weld controls made in Farmington Hills. ¹²²
Bosch Rexroth	welding equipment	Germany	PRC7000 resistance weld controls; US HQ Charlotte. ¹²³
Fronius	welding equipment	Austria	DeltaSpot spot-welding guns; US operations in Portage, Indiana. ¹²⁴

Source: en.prnasia.com [100]; connect.na.panasonic.com [101]; Staubli.com [102]; greaterzuricharea.com [103]; app.dealroom.co [104]; en.wikipedia.org [105]; ottomotors.com [106]; sec.gov [107]; assemblymag.com [108]; agile-robots.com [109]; siemens.com [110]; industrialautomationindia.in [111]; automate.org [112, 113, 117]; automotiveworld.com [114]; us.edag.com [115]; gasworld.com [116]; arotechnologies.com [118]; sosbes.sos.ky.gov [119]; cntrline.com [120]; sccommerce.com [121]; weldtechcorp.com [122]; boschrexroth.com [123]; metalformingmagazine.com [124]

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