

Europe Warehouse Automation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Warehouse Automation Market size is estimated at USD 4.28 billion in 2024, and is expected to reach USD 8.37 billion by 2029, growing at a CAGR of 14.40% during the forecast period (2024-2029).

Furthermore, whereas warehouse robots have had enormous deployments, COVID-19 is likely to significantly increase deployment speed. The COVID-19 outbreak has prompted warehouse owners to explore expediting their automation and robotics implementation timelines. Those who have successfully adopted automation have also demonstrated the establishment of safer workplaces by limiting worker interactions while raising productivity to meet rising e-commerce needs. Thousands of brick-and-mortar stores have closed their doors due to the recent increase in e-commerce.

Key Highlights

-In Europe, the warehouse automation growth increased post-pandemic. This results from two interconnected trends: a seemingly unstoppable rise in e-commerce and a persistent labor shortage resulting in rising labor prices. The market for warehouse robots in Europe has been driven by the growing number of warehouses and increased expenditures on warehouse automation, rising labor costs, and the availability of scalable technical solutions.

-Regarding demand and the presence of OEMs and System Integrators, Germany is one of the leading countries in warehouse automation. OEMs are well-represented in Europe, with strongholds in Germany, Italy, France, the Netherlands, and Spain. Central and Eastern Europe is a rapidly growing region within Europe, with Poland and the Czech Republic emerging as logistical hubs with promising economic potential. However, expansion and investment plans have been put on hold due to the present geopolitical circumstances, including the Russia-Ukraine conflict.

-The Internet of Things is driving inventory and warehouse automation developments. It's contributing to the transformation of the warehouse into a connected and coordinated system. In 2021 and beyond, lower costs and enhanced IoT sensors are expected to

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boost the use of IoT in warehouses. For Instance, In May 2020, DHL, a German logistics company, said that it had partnered with Cisco, a US technology company, to introduce IoT to three large warehouse operations across Europe.

-However, warehousing automation is extremely beneficial when it comes to lowering overall business expenditures and eliminating product delivery faults. Despite the benefits, 80 percent of warehouses are "still manually operated with no supporting automation," according to DHL, a notable 3PL business and a major end-user of warehouse automation technologies. Furthermore, conveyor-based, sorter-based, and pick-and-place warehouses account for 15% of all warehouses. In comparison, only 5% of today's warehouses are automated.

Europe Warehouse Automation Market Trends

Autonomous Mobile Robots (AMRs) are Gaining Popularity Throughout Europe

- Two European warehouse automation developments include using autonomous robots capable of transferring filled shelves and updating forklifts to help automation during busy periods. To transfer and take over activities traditionally handled by mobile robots, conveyors, manual forklifts, carts, and towing devices can all be used. Other applications include packing, transportation, and sorting.

- Autonomous mobile robots (AMRs) in logistical applications across Europe are displacing automatic guided vehicles (AGVs). AMRs, unlike AGVs, have more advanced onboard computers linked to inertial measuring units (IMU), laser scanning range finders, 2D and 3D color cameras, and motor controllers. AMR also opens up new possibilities for inventory management. These devices may now execute inventory sweeps autonomously at warehouse-determined schedules when paired with RFID-tagged products and equipment.

- For instance, the United Kingdom-based Iconsys expanded into autonomous mobile solutions with the launch of its iAM-R (Iconsys Autonomous Mobile Robot). It is designed to provide autonomous robotic solutions to the company's customers.

- In May 2022, Locus Robotics, a 2022 IFOY nominee and leader in autonomous mobile robots (AMRs) for fulfillment warehouses, announced the expansion of its warehouse AMR line. These new form factors join the Locus Origin robot to form a comprehensive family of AMRs that handle the full range of product movement needs in today's fulfillment and distribution facilities, from e-commerce, case-picking, and pallet-picking to scenarios needing larger, heavier payloads.

- In June 2022, At LogiMAT in Stuttgart, ek robotics, the leading manufacturer and integrator of high-tech automated guided vehicles (AGVs) for production and warehouse logistics, announced a global technology partnership with OTTO Motors, the world's leading developer of flexible and intelligent autonomous mobile robots (AMR). Customers in the manufacturing and warehousing industries worldwide will benefit from the combination of AGV hardware and AMR software offered by the two firms.

High Adoption of Automated Storage and Retrieval Systems (AS/RS) in Automotive Sector

- Many well-known vehicle brands are based in Europe, including Mercedes-Benz, Volvo, Aston Martin, Bentley, Porsche, Lamborghini, Ferrari, and others. Numerous vehicle production facilities in Germany, France, and the United Kingdom rely heavily on AS/RS systems to stay competitive. Exmac Automation, situated in the United Kingdom, provides storage solutions for Aston Martin, Bentley, Jaguar, and IBC vehicles.

- For instance, Industore, a major AS/RS solution provider in the UK, has a wide range of products utilized in warehouses and small and large storage units. ExMac Automation, another key player in AS/RS, provides automated storage and retrieval crane systems (ranging from high-capacity mini-load cranes and racking to high-bay warehouse cranes) to various industries across the country.

- The European Commission supports worldwide technical harmonization and offers to fund R&D to help the automotive industry maintain its competitiveness and technological leadership. Furthermore, according to ACEA research, 569 automobiles per 1,000

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people in the European Union. Luxembourg has the highest car density in the EU (694 cars per 1,000 people), while Latvia has the lowest. According to the OICA, total European passenger car sales reached 14.16 million in 2020.

- The demand-driven nature of the UK automotive supply chain (including increasing levels of customization within a car) is compelling OEM suppliers to choose warehouse automation with greater flexibility. The increasing adoption of AS/RS systems and automation in the automotive manufacturing process and the advent of digitization and AI are some of the primary factors driving the demand for digitalization in the automotive sector of the Netherlands.

- Moreover, Germany is one of the world's largest users of automated material handling systems. According to the International Federation of Robotics (IFR), Germany has the highest robot density (294 units per 10,000 workers), behind South Korea and Japan. These factors will increase the demand for warehouse automation throughout Europe.

Europe Warehouse Automation Industry Overview

The European warehouse automation market is fragmented by its competitive landscape. Dematic Group, Swisslog Holding AG, and Swisslog Holding AG (KUKA AG) WITRON, Logistik + Informatik GmbH SSI Schaefer AG BEUMER Group GmbH & Co. KG TGW Logistics Group GmbH, and Jungheinrich AG are some of the regional significant competitors in this sector.

These major competitors, which hold a considerable share of the market, are concentrating on growing their consumer base in new countries. Furthermore, market participants in the warehouse automation sector use major strategies, including product launches, acquisitions, and collaborations. The following are some of the most recent developments:

- February 2022 -DHL Supply Chain has deployed the first fully automated auto store logistics system with robot picking for the omnichannel auction site 1-2-3.tv in Braunschweig, Germany. The Autostore system was created by Element Logic, a logistics technology company, and it uses robot picking and a software solution to increase the processing speed of each order, improve operational efficiency, and maximize the location's storage capacity.

- November 2021 - Honeywell Intelligrated warehouse automation announced plans to create a new advanced research and development (R&D) testing center to fulfill the growing demand for technologies that enable speedier, more accurate supply chains. Honeywell hardware and software engineers will be able to create, prototype, and test novel warehouse automation systems utilized by logistics companies at the site.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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