

APAC AMH - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 208 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The APAC AMH Market size is estimated at USD 30.05 billion in 2025, and is expected to reach USD 53.12 billion by 2030, at a CAGR of 12.07% during the forecast period (2025-2030).

The automated material handling market in the Asia Pacific region is becoming increasingly integrated, with China as the core, bolstering its strong economic growth. Sectors, such as manufacturing, have driven much of this economic activity and have increasingly made supply chains complex.

Key Highlights

- In some Asia Pacific countries, the land for warehousing is becoming increasingly limited. In these areas, warehouses are expected to increase, with multi-story facilities and taller, narrower aisles. These trends are expected to drive the demand for material handling systems.
- Developing countries in Asia, such as India, significantly invest in material handling equipment. According to the Wisconsin Economic Development Corporation, the Indian market for materials handling equipment (MHE), accounting for about 13% of the market share of the country's construction equipment industry, witnessed significant growth in the recent past.
- The Asia Pacific emerged as one of the world's largest e-commerce hubs. The region witnessed a rapid growth in retail e-commerce, owing to the rising middle-class population in China, India, and Indonesia, along with the popularity of mobile gadgets. China alone accounts for 40% of the world's retail e-commerce sales.
- The food & beverage industry is witnessing high adoption of equipment due to the rising demand for automation. The automated technologies will allow these companies to perform their tasks in comparatively less time and effort. For instance, the Coca-Cola company has opened warehouses in Singapore valued at around USD 57 million to have automated storage and retrieval systems.
- Developing countries in Asia, such as India, significantly invest in material handling equipment. According to the Wisconsin

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Economic Development Corporation, the Indian market for materials handling equipment (MHE), accounting for about 13% of the market share of the country's construction equipment industry, witnessed significant growth in the recent past.

- The COVID-19 pandemic, which hit major countries like China, Japan, and India severely, is expected to influence the market's growth during 2022, as almost all production, logistics, and warehouses are under lockdown. Bringing unique challenges of social distancing and contactless operation has changed the standard operating procedure. Organizations were forced to limit the workforce and deal with the increasing demand.

APAC Automated Material Handling (AMH) Market Trends

Airports to Hold a Dominant Market Share

- Several countries realize the importance of investing in airports, as passengers are more likely to spend time and money in a pleasant and stress-free ambiance. The use of conveyors and sortation systems in major and small airports effectively reduces several inconveniences, from check-in to onboarding. This provides customers with a hassle-free experience.
- India and China are major contributors to the aviation industry developments in the region, owing to increasing per capita GDP and domestic air connectivity. For instance, according to the ICAO, Asia Pacific recorded 70% of the domestic traffic share.
- The Chinese aviation market is expected to witness significant growth over the next few years, as its three largest airlines, such as Air China, China Southern, and China Eastern, have ambitious fleet plans that will put their sizes at the top of airlines globally. China's major airports in Shanghai and Beijing are also undergoing major expansion plans.
- According to the Chinese Tourism Outbound Research Institute, by the end of 2030, the number of outbound trips made by Chinese travelers is expected to reach approximately 400 million, and Chinese tourists alone are likely to account for a quarter of international tourism. To ensure adequate support for such growth, airports need to have advanced systems. This is expected to impact the market's growth positively over the forecast period.

China to Hold Significant Market Share

- China has been a prominent contributor to the growth of the AMH market in the Asia Pacific region. The increasing demand for AMH products across industries, such as manufacturing, automotive, and e-commerce, is positively boosting the market's growth.
- China has a vast population and pursues an industrial policy. Measured on the PPP basis, the country became the world's largest economy and exporter, and trader during the current decade. The country is currently passing through the transition state of being manufacturing- and construction-led economy to a consumer-led economy.
- The ten-year plan, introduced in May 2015, is the government's bid to shift the industries up to the medium-high end of the global value chain and foster several advanced manufacturing clusters.
- With the adoption of automation in manufacturing, China is expected to cut manufacturing costs by 30% by 2025. The dearth of skilled labor, complicated by the one-child policy and an aging workforce, requires job activities to be eased to maintain productivity at work.

APAC Automated Material Handling (AMH) Industry Overview

The Asia Pacific automated material handling market is fragmented and highly competitive in nature. Product launches, high expense on research and development, partnerships and acquisitions, etc., are the prime growth strategies adopted by the companies in the country to sustain the intense competition.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- January 2022 - Wise Robotics partnered VisionNavRobotics to bring greater innovation to UK warehouses. The collaboration means VisionNav's innovative technology is expected to be available as part of the Wise Robotics range. This is expected to help UK operators increase order fulfillment and reduce the ongoing costs related to running a warehouse in the face of well-documented supply chain challenges.
- December 2021- KION Group announced the expansion in its Asia Pacific operations by opening a new forklift plant in China. Such expansion indicates direct funding activities and is expected to create more than 1,000 new jobs in Jinan in the medium term. The total volume for the Geek's counterbalance truck plant and an additional plant for supply chain solutions in the immediate vicinity, plus an R&D center and a technology center, comes to around EUR 140 million. Alongside the direct investment, the creation of jobs indicates the growth of a healthy economy surrounding the studied market in the region.
- November 2021 - Jungheinrich AG acquired arculus GmbH, a Munich-based autonomous mobile robot (AMR) developer, for an undisclosed amount. Arculus designs and manufactures AMRs, modular production platforms, and software solutions for mobile automation. Through this acquisition, Jungheinrich added hardware and software solutions in the rapidly-growing AMR sector to its portfolio of automation systems.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Industry Value Chain Analysis

4.3 Industry Attractiveness - Porter's Five Forces Analysis

4.3.1 Threat of New Entrants

4.3.2 Bargaining Power of Buyers

4.3.3 Bargaining Power of Suppliers

4.3.4 Threat of Substitute Products

4.3.5 Intensity of Competitive Rivalry

4.4 Assessment of the Impact of COVID-19 on the Market

5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Increasing Technological Advancements Aiding Market Growth

5.1.2 Industry 4.0 Investments Driving The Demand For Automation And Material Handling

5.1.3 Rapid Growth In E-commerce

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.2 Market Challenges/restraints

5.2.1 High Initial Costs

5.2.2 Unavailability Of Skilled Workforce

6 MARKET SEGMENTATION

6.1 By Product Type

6.1.1 Hardware

6.1.2 Software

6.1.3 Services

6.2 By Equipment Type

6.2.1 Mobile Robots

6.2.1.1 Automated Guided Vehicle (AGV)

6.2.1.1.1 Automated Forklift

6.2.1.1.2 Automated Tow/Tractor/Tug

6.2.1.1.3 Unit Load

6.2.1.1.4 Assembly Line

6.2.1.1.5 Special Purpose

6.2.1.2 Autonomous Mobile Robots (AMR)

6.2.1.3 Laser Guided Vehicle

6.2.2 Automated Storage and Retrieval System (ASRS)

6.2.2.1 Fixed Aisle (Stacker Crane + Shuttle System)

6.2.2.2 Carousel (Horizontal Carousel + Vertical Carousel)

6.2.2.3 Vertical Lift Module

6.2.3 Automated Conveyor

6.2.3.1 Belt

6.2.3.2 Roller

6.2.3.3 Pallet

6.2.3.4 Overhead

6.2.4 Palletizer

6.2.4.1 Conventional (High Level + Low Level)

6.2.4.2 Robotic

6.2.5 Sortation System

6.3 By End-user Vertical

6.3.1 Airport

6.3.2 Automotive

6.3.3 Food and Beverage

6.3.4 Retail/Warehousing/ Distribution Centers/Logistic Centers

6.3.5 General Manufacturing

6.3.6 Pharmaceuticals

6.3.7 Post and Parcel

6.3.8 Other End-Users

6.4 By Country

6.4.1 China

6.4.2 Japan

6.4.3 Indonesia

6.4.4 India

6.4.5 Australia

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.6 Thailand
- 6.4.7 South Korea
- 6.4.8 Singapore
- 6.4.9 Malaysia
- 6.4.10 Taiwan
- 6.4.11 Rest of Asia Pacific

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
 - 7.1.1 DAIFUKU Co. Ltd.
 - 7.1.2 Kardex Group
 - 7.1.3 KION Group
 - 7.1.4 JBT Corporation
 - 7.1.5 Jungheinrich AG
 - 7.1.6 SSI Schaefer AG
 - 7.1.7 VisionNav Robotics
 - 7.1.8 System Logistics
 - 7.1.9 BEUMER Group GmbH & Co. KG
 - 7.1.10 Interroll Group
 - 7.1.11 Witron Logistik
 - 7.1.12 Kuka AG
 - 7.1.13 Honeywell Intelligrated Inc.
 - 7.1.14 Murata Machinery Ltd
 - 7.1.15 Toyota Industries Corporation

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**APAC AMH - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts
(2025 - 2030)**

Market Report | 2025-04-28 | 208 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

