Asia Pacific Automated Material Handling And Storage Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The Asia Pacific Automated Material Handling And Storage Systems Market size is estimated at USD 29.66 billion in 2025, and is expected to reach USD 56.11 billion by 2030, at a CAGR of 13.6% during the forecast period (2025-2030).

With the rapid growth in stock-keeping units (SKUs), wholesalers and distributors are finding it difficult to make informed decisions about operations. This dilemma underscores the pressing need for more efficient labor, equipment, and technology utilization. Key factors driving the need for automated material-handling systems include cost savings, enhanced labor efficiency, and space optimization.

The market landscape is witnessing a surge in product variety and a demand for more frequent, smaller deliveries. Automated distribution operations can significantly boost an organization's order accuracy, often by several percentage points. The Asia-Pacific market's growth is propelled by urbanization, surging e-commerce sales, and a robust technology provider presence. These providers are intensifying their R&D efforts to offer cutting-edge solutions and maintain a competitive edge.

Asia-Pacific has cemented its position as a global e-commerce powerhouse. This status has been bolstered by the region's expanding retail e-commerce, driven by a burgeoning middle-income group in countries like China, India, and Indonesia, coupled with a fondness for mobile devices. Notably, China commands a staggering 40% share of global retail e-commerce sales. In several Asia-Pacific nations, the availability of warehouse land is dwindling, prompting a shift toward multi-story facilities and taller, narrower aisles. These adaptations are poised to fuel the demand for advanced material handling systems.

Material handling has witnessed a profound evolution over the past seven decades, with machines and robots increasingly replacing individual workers. This transformation has not only reshaped the industry but also fueled the growth of enterprises,

notably in the automotive industry, which has seen a tenfold expansion. Countries like India are significantly investing in material handling equipment, with the MHE market, as per the Wisconsin Economic Development Corporation, capturing around 13% of the country's construction equipment industry. Southeast Asian nations, including Thailand, the Philippines, and Vietnam, are witnessing a surge in manufacturing establishments, bolstering employment and, subsequently, disposable incomes. This rise in income, coupled with a growing awareness of international brands, is spurring demand for local warehouses.

Indonesia stands out as a nation swiftly embracing automation, with a notable uptick in robotic usage for industrial applications. Given Japan's dual role as both a supplier and a consumer, Indonesia stands to benefit from heightened trade activities, further propelling the region's automation demand.

The global industrial landscape faced significant disruptions due to the COVID-19 pandemic and ensuing lockdowns. These disruptions spanned supply chain challenges, raw material shortages, labor scarcities, fluctuating prices, and shipping bottlenecks, all of which threatened to inflate production costs and exceed budgets.

APAC Automated Material Handling & Storage Systems Market Trends

Assembly Line Segment to Witness Significant Growth in the Market

- Assembly-line AGVs find their primary application in industries like automobile manufacturing, coach-building, aerospace, and railways. The rising production of electric and hybrid vehicles is set to drive the demand for these AGVs in the coming years. This shift not only enhances manufacturers' flexibility but also enables them to swiftly adapt to market changes, all while ensuring safe and cost-effective operations.
- The automotive industry witnessed a revolution in the past decade with the introduction of electric and hybrid vehicles. This transformation has significantly increased the complexity of automobile production. Coupled with evolving safety regulations and industry standards, there is a growing need for automation in the automotive industry. Key priorities include reducing product damage, often caused by human error during transit, improving the speed of chassis handling between workstations, and facilitating interaction with assembly-line workers. Assembly line AGVs, meeting these requirements effectively, have become the cornerstone of automation in the automotive industry.
- Furthermore, in the automotive industry, automated assembly lines are utilized to craft various parts, ranging from engines and gearboxes to fuel systems and pumps. Leveraging robotics and vision technology, manufacturers can create ergonomic and efficient product lines, safeguarding their workforce from hazardous conditions while ensuring swift assembly. Consequently, safety concerns are propelling automation across the automotive landscape.
- According to a report by the Automotive Skill Development Council (ASDC), titled 'Human Resource and Skills Requirements in the Automotive Sector (2026),' India is projected to employ 45.08 million individuals in the automobile industry by 2026. This surge in the workforce demands a reevaluation of the current skill set, emphasizing the need for upskilling in areas like automotive design, robotics, IoT, and AI. As traditional roles evolve, the industry is witnessing a heightened push toward automation.
- To cater to this escalating demand, numerous market players are not only expanding their manufacturing capacities but also introducing new product lines. For instance, in March 2024, Applied Manufacturing Technologies (AMT), a prominent name in North America's automation engineering, unveiled its latest innovation, ROBiN. Termed the Robotic Induction System, ROBiN aims to revolutionize material handling in warehousing, promising heightened efficiency and throughput. With a strong reputation in advanced material handling and cutting-edge autonomous mobile robots (AMRs), AMT's ROBiN is poised to make a significant impact in the industry.

Industry 4.0 Investments Driving Demand for Automation and Material Handling

- Airport investments are gaining global recognition as nations understand the value of creating welcoming environments that encourage travelers to spend both time and money. From check-in to boarding, conveyors and sortation systems, prevalent in airports of all sizes, effectively streamline the process, enhancing the overall customer experience. Many airports are now collaborating with vendors to introduce autonomous robots, a move that not only boosts luggage transfer efficiency but also trims operational costs. For example, Vanderlande Dutch, a logistics automation specialist, recently partnered with Hong Kong Airport to trial autonomous baggage handling vehicles.
- India and China, driven by increasing domestic air connectivity and rising per capita GDP, stand out as pivotal players in the regional aviation landscape. Highlighting this, the ICAO notes that the Asia-Pacific region alone accounted for 70% of domestic air travel.
- Projections indicate a robust growth trajectory for the Chinese aviation market in the coming years. Notably, China's top three airlines-Air China, China Southern, and China Eastern-have set ambitious fleet expansion goals, aiming to elevate their global rankings. Furthermore, major airports in Shanghai and Beijing are actively pursuing extensive expansion initiatives.
- According to the Chinese Tourism Outbound Research Institute, Chinese outbound visits are set to reach around 400 million by 2030, potentially constituting a quarter of all global outbound travelers. To accommodate this surge, airports must deploy advanced systems, a move that is expected to drive market growth positively throughout the forecast period.
- Conversely, the pandemic prompted many airports to deploy robots for passenger screening and virus containment. For instance, South Korea's Incheon Airport's Smart Airport team has been leveraging robotics and automated vehicles to enhance the experience for passengers with reduced mobility (PRMs).

APAC Automated Material Handling & Storage Systems Industry Overview

The Asia-Pacific market for automated material handling and storage systems is fiercely competitive, primarily due to the significant number of players in the arena. Key factors shaping this competition include high exit barriers, increasing firm concentration, and rising market penetration rates. Some of the key players operating in the market are Kardex Group, KION Group, JBT Corporation, Jungheinrich AG, Daifuku Co. Ltd, and BEUMER Group GmbH & Co. KG.

- In February 2024, Skechers USA, a prominent global footwear and apparel brand, partnered with Hai Robotics, a top player in automated storage and retrieval systems (ASRS), to inaugurate its latest distribution hub in Minato City, Tokyo, Japan. By leveraging Hai's cutting-edge automated goods-to-person technology, Skechers is enhancing its warehouse operations, accelerating fulfillment, and ensuring precise order processing.
- In January 2024, Fujitsu Limited and YE DIGITAL CORPORATION announced a collaboration aimed at tackling labor shortages and bolstering sustainable supply chains in Japan's logistics industry. The partnership focuses on leveraging Fujitsu's WMS services, known for enhancing distribution center efficiency, alongside YE DIGITAL's WES MMLogiStation, which is designed to automate warehouse operations. Fujitsu will not only provide its WMS services but also offer planning support for constructing new distribution centers and transforming operations at existing ones, aiming to ease the adoption of automated facilities. By streamlining facility management, the companies aim to drive operational automation and enhance overall distribution center performance.

Additional Benefits:

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

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