

Asia Pacific Automated Storage and Retrieval System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia Pacific Automated Storage and Retrieval System Market is expected to register a CAGR of 9.95% during the forecast period.

Key Highlights

- The Asia-Pacific region is witnessing an increasing focus towards automation by the warehousing companies, which is anticipated to drive the market for Automated Storage and Retrieval Systems. According to Warehouse 2020 APAC Vision Study conducted by Zebra, 73% of the warehousing companies in the region plan to increase the number of warehouses by 2020, and 52% of them also plan to reduce space expansion in existing warehouses in 2020.
- Further, many of the food and beverage industry companies have recognized the advantages provided by the ASRS systems and have increased their focus towards market adoption.
- For instance, Australia's confectionery manufacturer, Cadbury Schweppes, successfully upgraded its national distribution center in Melbourne. The upgrade resulted in a 20% productivity improvement to its warehouse's automated storage and retrieval system while maintaining full distribution capability. It involved refurbishing and upgrading four ASRS cranes and modernizing the distribution center's conveyor and sortation system.
- South Korea has always been one of the world's top automotive manufacturing countries and one of the largest automotive exporters since the 1990s. Eco-friendly vehicles, including electric vehicles, hybrid electric vehicles, and fuel-cell electric vehicles, are expected to be the fastest-growing automotive end-user segment in South Korea during the forecast period. This provides a massive opportunity for automation in the automotive industry in the country.
- Moreover, Japan introduced lean manufacturing, a Just-In-Time concept in intralogistics. The close-knitted structure allowed the nation to adopt AS/RS systems at every level, economic and efficient. Currently, with the world looking forward to the fourth industrial revolution, Japan plays a significant part.

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- Further, Indonesia is categorized as an aggressive automation-adopting nation. The country has recorded increased robotic usage for industrial work. Since Japan is both its supplier and consumer, Indonesia is expected to benefit from the trade with Japan. Thus increasing the demand for automation in the region.

Asia-Pacific ASRS Systems Market Trends

Retail Industry is Expected to Hold Significant Market Share

- The retail sector generated the second-highest demand for ASRS in the region, after post and parcel, compared to other industries. ASRS, when compared to different equipment types, has witnessed a higher adoption in the region's retail sector, and China and India have significantly contributed to this.
- Additionally, the Chinese retail revenue has been on a constant increase since 2011, significantly driving up the automation in the country's retail sector. A rise in retail requires effective storage and warehouse management of products suitably requiring ASRS. According to China's Ministry of Commerce (MOFCOM), China's retail sales are expected to surpass sales in the United States in upcoming years due to the innovation and transformation of retail enterprises.
- Moreover, the growth of the market in India is complemented by the adoption of industrial automation systems with various companies offering different solutions and is characterized by recent developments. For instance, Delta Electronics provides a wide range of automation products and solutions, including robot solutions for warehouses.
- The convergence of flagship programs, such as Skill India and Digital India, is the key to achieving this goal, thereby driving the country's market growth. In December 2020, Skill Ministry and Tata launched the first batch of the Indian Institute of Skills. Such programs are rolled out in India to develop Factory Automation and Retrieval System skills and create greater awareness amongst the general public and business organizations.
- Further, In Indonesia, the onset of Industry 4.0 is driving the studied market, focusing on implementing factory automation systems in the manufacturing of the food and beverage industry, textiles and clothing, automotive, chemical, and electronics. Cross government initiatives between Indonesia and Germany are strengthening the start-up ecosystem in the country. In addition to this, in June 2020, Maruka Corp., a Japanese industrial and construction machinery trader, announced to set up a wholly-owned subsidiary in Indonesia for a dedicated factory automation and storage system unit. It offers to design, produce, market, and repair robot systems, production lines, and washing equipment as demand for factory automated systems in the Southeast Asian country increases.

China Accounts For the Largest Market Share

- China has been a prominent contributor to the growth of the ASRS market in the Asia-Pacific region. The increasing demand for ASRS products across industries, such as manufacturing, retail, automotive, and e-commerce, boosts the market's growth.
- Further, the government's ambitious 'Made in China 2025' initiative, partially inspired by Germany, for Industry 4.0 aims to boost the country's competitiveness in the manufacturing sector.
- An e-commerce giant in China, JD.com Inc., recently built an efficient ASRS for effective warehouse management to cater to the demand for increasing retail sales. Additionally, Samson Holding was one of the first companies to implement ASRS in the Chinese furniture industry, enabling automatically and mechanically storing, tracking, and retrieving every product produced, thus saving ample preparation time required to assemble different products for each shipment.
- Furthermore, Chinese retailers are developing unmanned shops. For instance, Suning, the Chinese online shopping platform, launched five unmanned shops in China, which apply facial recognition technology to payment services and offer shoppers an intelligent shopping experience based on their consumption habits. This has significantly contributed to the growth of the market

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studied in the region.

- In October 2020, Tencent-backed food delivery service, Meituan-Dianping, introduced its first-ever smart AI retail store, MAI Shop, within Beijing's Shougang Park. The store is equipped with a combination of AI and robotics, which are regularly seen in "New Retail" formats across supermarkets, convenience stores, and more in China. The combined technology brings an unmanned delivery retail experience as Meituan integrates a fully automated warehouse and distribution to maximize its takeout delivery capacity.

Asia-Pacific ASRS Systems Industry Overview

The Asia-Pacific automated storage and retrieval system market is fragmented and highly competitive. Product launches, high expense on research and development, partnerships and acquisitions, etc., are the prime growth strategies adopted by the companies in the region to sustain the intense competition. Some of the recent developments in the market are -

- August 2020 - KION Group has signed a distribution agreement and a memorandum of understanding on plans for joint development with the Chinese manufacturer to expand automation solutions. The collaboration with Quicktron is anticipated to strengthen further the former's position in the automated storage and trucks market.
- June 2020 - Cohesio Group, now known as Korber Supply Chain, introduced a new sorting robot solution in Australia and New Zealand. The Korber solution will allow logistics operators to maximize operational capabilities through flexible, affordable, and scalable automation.

Additional Benefits:

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

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