

Europe Automated Storage And Retrieval System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Automated Storage And Retrieval System Market size is estimated at USD 6.72 billion in 2025, and is expected to reach USD 10.47 billion by 2030, at a CAGR of 9.27% during the forecast period (2025-2030).

Key Highlights

- The Automated Storage and Retrieval System (ASRS) market in Europe is experiencing significant growth, driven by advancements in automation technology and increasing demand from various industries. The expanding population significantly impacts the demand for many product categories across many industries. The surge in demand for optimized and space-efficient storage systems also supports the industry's growth.
- Europe has been the earliest adopter of industrial automation, owing to increasing investments in the Industry 4.0 revolution. According to the CBI Ministry of Foreign Affairs, Europe accounts for more than one-third of the global Industry 4.0 investments. Western and Northern Europe are its main markets, especially Germany, where the term was initially coined and is a frontrunner.
- Maintaining the stockpiles of consumer goods for multiple enterprises requires using warehouses, storage facilities, and distribution centers. Manufacturers and supply chain partners prefer minor product damage during storage, low storage costs, and quick pick-up and delivery of items for storage and subsequent product mobility.
- Northern Europe is traditionally the most developed market in terms of warehouse automation. Besides the high labor costs, the working conditions at the factory have also prompted the adoption of sophisticated and advanced automation. In Scandinavia, System Logistics has supported essential clients in the food and beverage sector in effectively managing picking, warehousing, and material handling operations.
- This, along with growing industrial automation for improving productivity and quality while raising safety, reducing errors, and introducing flexibility to the manufacturing process, is one of the key factors driving the market. Modern sensors are also assisting ASRS's technological advancement. This is fueling the market's expansion and increased demand for better storage systems

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across various industries.

- Moreover, men and machines frequently work more closely in European warehouses. A lack of an efficient and skilled workforce could accelerate automation further, according to JLL, an investment management company. Additionally, Germany is increasing the adoption of Industrial Robots due to the growth of various industrial enterprises and increased automation adoption in storage and processing, primarily due to the increasing safety measures and labor costs. This increases the need for PLC, MES, HMI, SCADA, and DCS, among other industrial control systems.
- Further, expanding cross-border e-commerce, increasing the volume of parcels being handled, and growing awareness among states with lesser automation contribute to faster growth. But, the demand for ASRS is volumetrically lower in other countries than the top nations, like Germany, France, and the United Kingdom in this region.
- Storage racks, automated systems, and software are all parts of the enormous and intricate ASRS system. The system needs to be deployed more precisely right away during the installation process. A small error in accuracy or calculation could cause the entire production process to stop. Lack of technical competence to oversee system operations may be the market's most significant barrier.

Europe Automated Storage And Retrieval System Market Trends

Automotive is Expected to Hold Significant Market Share

- The automotive sector is predicted to dominate the market for automated storage and retrieval systems. This segment's significant market share is primarily attributable to the growing emphasis on Industry 4.0, a shortage of skilled laborers, particularly in emerging economies, an increase in local government initiatives to revive the automotive industry, and a desire to reduce reliance on third-party logistic providers.
- During the projection period, the automotive category is anticipated to have a sizable market share. Automakers have been encouraged to increase car and component manufacturing by the increased demand for electrified and driverless vehicles. As a result, suppliers must increase storage capacity within the limited floor space since automobile manufacturers must effectively manage many spare parts during manufacturing, pushing the market.
- Additionally, the automotive industry can take advantage of opportunities provided by European Smart automation factories, which include Automated Storage and Retrieval Systems, to respond to market demands more quickly, cut down on manufacturing downtime, improve the effectiveness of supply chains, and increase production in the area.
- Leading European nations like France and Germany make significant investments in machinery and technology. Because the motor vehicle industry placed a sizable order for industrial robots, the demand from suppliers of automotive parts grew. The opportunity to use cutting-edge gear and equipment is expanding as production systems become more modern and digital.
- Moreover, Automakers and suppliers are moving toward using collaborative robots, known as cobots, for ASRS. Such devices often are smaller, have more agility, and can be safely deployed alongside human operators. For instance, BMW relies on cobots to improve the safety of workers within its plant and for the quality of goods and components produced. Other companies following the same include Nissan and Ford - specifically in their Cologne, Germany, plant.
- The primary drivers of the European market are the widespread adoption of automation technology, the growing adoption of Industry 4.0, the thriving e-commerce industry, and the substantial presence of automotive firms. Additionally, the market is growing as a result of the positive encouragement from local governments that are concentrating on enhancing digital infrastructure, increasing demand for high-efficiency storage systems, rising order velocity and volume of the e-commerce sector, rising ASRS deployment by SMEs, and growing need to minimize human interaction and interaction errors.
- Further, as it has been identified that the auto assembly increased significantly using automation, showing a growth pattern in the number of cars being produced in the region while simultaneously cutting costs, the smart factory implementation in this sector has grown considerably which is expected to increase the adoption of ASRS systems.

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United Kingdom is Expected to Hold a Major Share of the Market

- Throughout the United Kingdom and Europe, political, economic, and technological developments are impacting the growth of the manufacturing industry proportionally. Although the BREXIT vote sent shockwaves across all industries, the manufacturing industry remained positive.
- The pandemic put many industries into disarray, especially the logistics industry, which struggled to get essentials to consumers during lockdowns and border closings. Manufacturers across industries had to rethink and look towards efficient processes in warehousing, moving goods internally within the factory, and dealing with labor shortages from both the pandemic and Brexit. Resultantly, the demand for AS/RS is increasing.
- AS/RS systems are also widely used in the airport industry to satisfy the increasing demand for reliability and speed and to handle all types of baggage (from check-in to loading into the luggage hold). AS/RS are extensively used in all the airports in the country, especially at Heathrow, the United Kingdom's busiest airport.
- Recently, the UK's Stansted Airport completed a EUR 70 million (USD 71.72 million) upgrade to its baggage handling system, installing 2.4 km of track and 180 automated carts to improve efficiency. In addition, increasing the number of airports in the country may further drive the demand for automated storage and retrieval system. For instance, according to National Statistics United Kingdom, the revenue in Air Transport was projected to amount to USD 44.78 billion in 2023.
- Furthermore, the growing trend of replacing conventional vehicles with EVs is expected further to augment the automotive industry's demand in the country, thereby creating demand for the market studied. Further, according to the Society of Motor Manufacturers and Traders, the UK automotive industry is one of the region's most valuable economic assets, contributing roughly USD 22.7 billion per year to the economy. In addition, the sector employs hundreds of thousands of people across the country in high-skill and high-value jobs. Such instances are expected to augment the market's growth in the country.

Europe Automated Storage And Retrieval System Industry Overview

The Europe Automated Storage and Retrieval System market is fragmented and highly competitive. Product launches, high expenses 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. Key players in the market are Daifuku Co., Ltd., KUKA AG, Kion Group AG, and others.

Overall, the European ASRS market is poised for significant growth driven by e-commerce demands, technological advancements, and a focus on operational efficiency. While challenges exist, the ongoing trends indicate a robust trajectory toward increased automation across various industries in Europe.

Additional Benefits:

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

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