

Latin America, Middle East And Africa Automated Guided Vehicles - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Latin America, Middle East And Africa Automated Guided Vehicles Market size is estimated at USD 0.57 billion in 2025, and is expected to reach USD 1.16 billion by 2030, at a CAGR of 15.23% during the forecast period (2025-2030).

Key Highlights

- The growth of Latin America, the Middle East, and Africa's automated guided vehicle market is augmented by the growing demand for automation in material handling in large industrial buildings, such as a factory or warehouses, rapid shift in demand from improved safety standards at workplaces and mass production to mass customization. Besides, the exponential growth of industrial activities in emerging economies, the rising adoption of industrial automation by SMEs, and the presence of the intralogistics sector are likely to fuel the studied market.
- Recently, Egypt, Jordan and UAE announced an industrial partnership for USD 10 billion projects. The partnership, which seeks to boost industrial cooperation between the three countries, aims at implementing joint investments and projects to foster mutual and strategic interests. The investments will be implemented in pharmaceuticals, agriculture, food manufacturing, petrochemicals, metals, and minerals. Such instances are expected to boost the demand for AGV in the country.
- Moreover, warehouses run completely based on automation, eliminating several additional costs. Achieving lights-out automation has been an essential target for various manufacturing facilities. Lights-out automation involves fully automated systems for multiple components in manufacturing. Further, to limit the scope for errors and increase productivity in the domain, most factories are trying to determine human intervention. For example, recently, DP World UAE declared an agreement with international companies to construct two new food processing facilities in Dubai. Furthermore, DP World UAE's Jebel Ali Port Food and Agriculture Terminal has established Dubai as a major hub for international trade in the food and beverage sector.
- Further, the rapid growth of e-commerce is further leading to the development of the market. Due to the growth of online shopping, stock-keeping units (SKUs) are increasing in volume and variety, and only fixed automation systems can meet the

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demands. Flexible automation in the form of robotics is meant to complement conventional automation systems like conveyor belts.

- The COVID-19 pandemic has had a significant impact on the adoption of automation in a variety of industries. It has altered the traditional business model by introducing novel issues of social distance and contactless operations. Companies have had to reduce their workforce and meet the growing demand. While the spread of the virus has been grave enough to warrant shutdowns, for instance, food production facilities, multiple other businesses have been able to continue operations with the addition of new health measures.

Latin America, Middle East And Africa Automated Guided Vehicles Market Trends

Industry 4.0 Investments driving the Demand for Automation and Material Handling

- According to PPRO, e-commerce accounted for 15% of Latin American retail sales in January 2023 and 14% in Mexico. Further, Amazon added categories, such as smartphones, notebooks, tablets, and accessories, and further fine-tuned its logistics in a few months before offering a complete product assortment in the country.

- With well-built logistics networks in the region, United Arab Emirates is an encouraging platform for the e-commerce industry. For instance, UAE-based e-commerce fulfilment start-up, Shorages raised USD 700,000 in a seed funding round to allow international e-commerce companies access to the UAE and GCC markets. The raised funds will be used for expansion and recruitment as part of the company's strategy to establish more warehouse facilities across the UAE.

- With the increasing interest of the government and local players to develop the local market, global players, like DHL, are experimenting in the market. Over the forecast period, the country is expected to draw more logistics players into the market, increasing the demand for AGV in the country.

- In addition, South Africa's well-established logistics networks make it an ideal platform for an e-commerce business. Furthermore, according to World Economic Forum South Africa, "South Africa has recognized that the future of trade lies in digital transformation, and e-commerce is a key component of that transformation." E-commerce is expected to revolutionize the way businesses in Africa manufacture, sell and consume goods and services. This, in turn, is expected to drive Africa's e-commerce & logistics sector. All of these factors will contribute to the growth of the market.

- The ongoing construction activities in Qatar and Oman, owing to the FIFA and Cricket World Cup, are expected to boost to market studied. Moreover, Qatar Tourism Authority planned to invest about USD 20 billion in tourism infrastructure as the number of tourist arrivals grows at a compound rate of 15.9 percent annually. Owing to an expected steady increase in the number of tourists visiting the region, supported by the rise in industrial production, equipment, like sortation systems and automated guided vehicles, are expected to record higher demand in the region during the forecast period.

United Arab Emirates is Expected to Account For Significant Market Share

- As per World Economic Outlook Database, United Arab Emirates is the fifth largest economy in the Middle East, with gross domestic product (GDP) of USD 568 billion in 2024. As per World Bank, the manufacturing sector accounted for around 12% of the UAE's GDP in 2024.

- Owing to this, the UAE Government is focused on doubling the contribution of industrial manufacturing to the UAE's GDP to 25%, as highlighted in Vision 2021, Dubai Industrial Strategy 2030, and Abu Dhabi Economic Vision 2030. Operation 300bn is a government strategy launched in 2021 that aims to develop the UAE's industrial sector and enhance its role in stimulating the national economy. It aims to raise the industrial sector's contribution to the GDP from AED 133 billion (USD 36.21 billion) to AED 300 billion (USD 81.68 billion) by 2031.

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- The country's growing food and beverage e-commerce industry and is another driving factor. E-commerce growth directly leads to warehouse automation for optimizing operations, positively influencing the market. The warehouses deploy AGVs to carry out warehouse logistics and procedures, which can lift heavy weights and have been reported to save the time taken to complete the logistical processes threefold. The growing penetration of online shopping in the country is another contributing factor.
- Many people in the country are adopting e-commerce for their daily necessities, such as drinks, biscuits, and shampoos. The retail market is expected to experience rapid growth during the forecast period and help increase the adoption of automation in retails. For instance, recently, a joint study by Dubai Economy and global payments technology company Visa, the United Arab Emirates is making rapid strides as the fastest-growing e-commerce market in the Middle East. According to the study, UAE shoppers are among the top online spenders. In a broader Middle East, North Africa, and South Asia (MENASA) region, the United Arab Emirates represents the significant annual spending per online shopper. Such factors lead to the demand for various types of packaging in the e-commerce segment.?
- Furthermore, AGVs achieved significant success in hospitals, with NHS installing AGV solutions throughout hospitals in the United Arab Emirates. AGVs in hospitals carry all the payloads that move repetitively between departments, such as food, linen, stores, waste, pharmacy, and sterile supplies. Reliable and timely delivery of various shipments helps hospitals run more efficiently and better target other resources.
- The demand for AGVs is primarily driven by the country's automotive, metal, healthcare, and pharmaceutical industries. With the recent covid outbreak, the need for automation is expected to increase over the long run, primarily to cope with the shortage of labor and rising costs. Dubai South, for example, signed a Memorandum of Understanding with Evocargo in December 2022 and initiated the UAE's first autonomous vehicle cargo trials at the master development's Logistics District. Dubai Logistics District estimates that the strategy, when implemented in full, will lead to a 44% reduction in transportation costs, resulting in an AED 900 million savings, a reduction of environmental pollution of 1.5 billion, and a 20% increase in transport sector efficiency of AED 18 billion.

Latin America, Middle East And Africa Automated Guided Vehicles Industry Overview

The Latin America, Middle East, and Africa automated guided vehicle (AGV) market is fragmented and is home to various significant vendors depending on the location. The major vendors in the market garner a more in-depth product portfolio catering to customers' different requirements. In contrast, other vendors operate in niche segments providing customizations and customer-specific orders. Key players include Kuka Group, Schaefer Systems International Pvt Ltd, ABB Ltd., Jungheinrich Group, etc.

In the region, rising labor costs are compelling companies to adopt AGVs to enhance operational efficiency and reduce dependency on manual labor. In conclusion, the AGV market in Latin America, the Middle East, and Africa is poised for robust growth driven by technological advancements and the increasing need for efficient operations across various industries.

Additional Benefits:

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

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