

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

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Report description:

The North America Automated Storage and Retrieval System Market is expected to register a CAGR of 9.01% during the forecast period.

Key Highlights

- North America is one of the largest markets for automated storage and retrieval systems (ASRS) globally, led by the United States. The region's manufacturing sector, which is a vast source of demand for the ASRS solutions, hinges on the dominant US economy, accounting for 82% of the region's economic output.
- Moreover, with the rapid growth in stock-keeping units (SKUs), wholesalers and distributors find it difficult to make informed decisions about the operations. This factor is driving the need for more innovative usage of labor, equipment, and technology. The significant factors driving automated material-handling systems are cost savings, labor efficiency, and space constraints.
- In the current market landscape, there is an increase in available products and demand for more frequent and smaller deliveries. The automated distribution operations can immediately increase an organization's order accuracy, from half a percent up to several percentage points.
- Other prominent factors, such as steady growth in wages paid to workers in the country, have made warehouse operators look forward to alternate solutions for warehouse management and are expected to drive the demand for automation in several end-user industries that are highly dependent on the workforce, such as manufacturing and retail, among others.
- Furthermore, the United States, over the forecast period, is expected to witness robust growth in several domestic robotic solutions, owing to government policies that aim at increasing domestic production rather than importing finished goods.
- Moreover, enterprises are focusing more on adopting diverse technologies for their business operations to reduce their overall costs and gain a competitive advantage over their rivals. Vendors of material handling solutions have gradually veered toward the modern approach of helping end-users focus on the space and time utility of their operations by manufacturing flexible systems

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that can seamlessly integrate with other systems as a part of the overall material handling plan.

North America Automated Storage and Retrieval System Market Trends

Retail Industry is Expected to Hold Significant Market Share

- North America's retail market is one of the largest in the world. The country has a high presence of omnichannel vendors that stand to be one of the largest consumers of material handling solutions, such as ASRS. The demand for ASRS is especially high from the e-commerce establishments that require high throughput operations in their fulfillment centers.
- The United States stands to be one of the major retail markets in the region. It is estimated that more than two-thirds of the country's GDP is generated from retail consumption every year. In the country's e-commerce sector, the sales growth continues to increase more than the physical stores. With automation being the key differentiating factor, there is increasing competition between online and omnichannel retailers.
- Moreover, high number of online shoppers and extreme internet penetration in the region are expected to be the primary driving factors of the retail industry in the country. Internet penetration in the region was the highest in the world and stood at 89.4%.
- Further, the retailers in the region have recognized the need for ASRS, thus offering more tangible benefits in the consumer's mind, such as loyalty benefits. The technology has been better integrated with several commerce sites to create a seamless experience.
- Some players are investing in developing ASRS due to the sudden increase in demand during the coronavirus pandemic. For instance, in July 2020, Next Generation Manufacturing Canada (Ngen) invested USD 5 million in projects leading to the development and production of Automated storage and retrieval systems technologies instead of manually to help stop coronavirus spread.

United States Accounts For Largest Market Share

- According to the Bureau of Transportation Statistics, the US is home to 19,919 airports, including private and public. The largest airport in the United States is the Denver International Airport and sees over 31,000,000 passengers every year. The number of storage retrieval systems used in airports in the country holds a significant global share.
- Furthermore, the United States, over the forecast period, is expected to witness robust growth in several domestic robotic solutions, owing to the government policies that aim at increasing domestic production rather than importing finished goods.
- According to RIA estimates, as of September 2020, approximately 293,000 robots were in use in the United States. With the increasing trends toward locally produced robots in the next four years, the country's manufacturing sector is anticipated to create a considerable demand for material handling solutions, including ASRS, in the country.
- Moreover, e-commerce is a significant driving factor for the demand from automated distribution warehouses, such as ASRS, as consumers seek ever-shorter delivery times. COVID-19-related boosts in online shopping resulted in an additional USD 174.87 billion in e-commerce revenue in 2020 (source: US Commerce Department). The system's ability to maintain an inventory record with accurate tracking has made it valuable to this industry. Along with this, the process of online retail is primarily driven by automated system control by computers, where ASRS can be integrated with simplicity while attaining a high rate of efficiency. These factors combined have led to a massive demand for these systems in the retail industry.
- Further, other prominent factors, such as steady growth in the wages paid to workers, have made warehouse operators look forward to alternative warehouse management solutions. These factors are anticipated to drive the demand for automation in several end-user industries that are highly dependent on the workforce.

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North America Automated Storage and Retrieval System Industry Overview

The North American automated storage and retrieval system market is competitive and covered by many significant players. Vendors provide a deep product portfolio catering to the customer's needs in the region. Key players include Daifuku Co. Ltd, Schaefer Holding International GmbH, Dematic Group - KION Group AG, Murata Machinery Ltd, Mecalux SA, etc. Some of the recent developments in the market are -

- February 2021 - Rockwell Automation and Fanuc America announced forming a coalition for an apprenticeship program to educate and help develop workers' skills for robotics and automation in storage and distribution.
- February 2020 - ABB Limited and Covariant announced a partnership to bring AI-enabled storage solutions to market, starting with a fully autonomous warehouse order fulfillment solution. The partnership brings together the two companies with a common vision for robotics enabled by AI.

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 INSIGHTS

4.1 Market Overview

4.2 Industry Value Chain Analysis

4.3 Industry Attractiveness - Porter's Five Force Analysis

4.3.1 Bargaining Power of Suppliers

4.3.2 Bargaining Power of Buyers

4.3.3 Threat of New Entrants

4.3.4 Threat of Substitute Products

4.3.5 Intensity of Competitive Rivalry

5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Increased Emphasis on Workplace Safety

5.1.2 Increasing Concerns about Labor Costs

5.2 Market Restraints

5.2.1 Need for Skilled Workforce and Concerns over Replacement of Manual Labor

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5.3 Impact of COVID-19 on the Market

6 MARKET SEGMENTATION

6.1 By Product Type

6.1.1 Fixed Aisle System

6.1.2 Carousel (Horizontal Carousel + Vertical Carousel)

6.1.3 Vertical Lift Module

6.2 By End-User Industries

6.2.1 Airports

6.2.2 Automotive

6.2.3 Food and beverages

6.2.4 General Manufacturing

6.2.5 Post and Parcel

6.2.6 Retail

6.2.7 Other End-user Industries

6.3 Country

6.3.1 United States

6.3.2 Canada

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 Daifuku Co. Ltd

7.1.2 Schaefer Systems International Pvt Ltd

7.1.3 Dematic Group (KION Group AG)

7.1.4 Murata Machinery Ltd

7.1.5 Mecalux S.A.

7.1.6 Honeywell Intelligrated

7.1.7 Swisslog Holding AG

7.1.8 Knapp AG

7.1.9 Kardex Remster

7.1.10 Bastian Solutions Inc.

7.1.11 Toyota Industries Corporation

7.1.12 Viastore Systems Inc.

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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