

Southeast Asia Warehouse Automation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Southeast Asia Warehouse Automation Market size is estimated at USD 0.81 billion in 2025, and is expected to reach USD 1.46 billion by 2030, at a CAGR of 12.51% during the forecast period (2025-2030).

Over the projected period, the market in Southeast Asia will be driven by rising production complexity, technological advancement, and the rapid rise of the e-commerce industry. Furthermore, the emergence of several startup firms with strong technological capabilities and financial backups supports the studied market's growth.

Key Highlights

- As investments in automation are prevalent across all industrial markets, warehouse operators are increasingly adopting automation technologies to boost operational efficiency and productivity and minimize handling time. With a range of investment and value-creation opportunities, the studied market is expected to witness steady growth in the next few years.
- The increased volume of e-commerce will drive the industry ahead. Warehouse automation is increasingly establishing the trump card for companies pursuing a competitive edge, especially in the competitive e-grocery market, as traders struggle to keep up with the expanding number of transactions and related last-mile shipping needs. According to the International Trade Administration (ITA), the e-commerce market in Singapore is expected to reach USD 10 billion by 2026.
- Furthermore, Thailand's usage of autonomous guide vehicles in industries and warehouses, especially healthcare, is expected to increase by 60% per annum to over 700,000 units by 2022, according to the International Federation of Robotics, and is expected to increase in the coming years. During the forecast period, the growth of the studied market should be helped by the fact that robotic technology is being used more and more in different industries.
- However, obstacles such as a shortage of experienced workers, high investment, and technical problems associated with warehouse robotics are expected to restrain the Southeast Asia warehouse automation market over the forecast period.

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- The COVID-19 outbreak hastened the shift to e-commerce, resulting in a shift in customer behavior. A variety of payment options has also contributed to the online purchase. Following the pandemic, the most significant and rising developments have included micro-fulfillment centers, e-grocery expansion, dark stores, and automated cold storage. Increasing investments by players in these sectors are expected to propel market expansion in the post-covid period. Tee Yih Jia Food Manufacturing Pte Ltd and SSI Schafer, for example, announced in February 2022 the opening of Singapore's largest automation rack-clad high bay warehouse, storing capacity at Tee Yih Jia's newest USD 450 million production plant in Senoko.

Southeast Asia Warehouse Automation Market Trends

Retail (Incl. e-commerce) Sector to Dominate the Market

- Retail warehouse automation is a service that retailers may employ to streamline logistical operations, enhance customer satisfaction, and boost revenues. Retail enterprises provide products and services to end users, including supermarkets, departmental stores, clothing, general merchandise, appliances, and food and beverages. Additionally, the segment in the study also considers e-commerce. The warehouses of retail businesses often handle a huge volume of SKUs, which can be kept on pallets or in boxes. All procedures must be optimized to avoid mistakes and ensure the product is available to clients.
- Retailers will continue using warehouse automation to keep up with an ever-increasing e-commerce trajectory and consumer service and personalization demands. To add value and meet high brand standards, top retailers are implementing automation to speed up the last mile of their supply chain. In addition to managing many SKUs, they prepare and ship a tremendous volume of orders daily to a wide range of locations. Given these limitations, automation is a great way to increase production while ensuring accuracy and speed in order picking.
- According to The Business Times in Singapore, most businesses intend to utilize their investments in new technology on various levels. 76% intend to provide clients with individualized shopping experiences by installing identifying systems in the establishments. In addition to the substantial automation of operations, sensors and cameras for warehouse management are also anticipated.
- Food and beverage warehouses required more stock and throughput to keep up with the shift in demand brought on by COVID-19. In order to correctly manage many SKUs in a constrained amount of space, food and beverage warehouses must have the necessary logistical capabilities. Facilities must adjust and offer a range of outbound order types due to a surge in demand for own-brand labels, prepared goods, and e-grocery.

Indonesia is Expected to Hold a Significant Market Share

- The logistics vision for Indonesia for 2025 is "locally integrated, globally connected," consistent with transforming the national logistics system into Logistics 4.0. The goal is to connect and fully integrate the domestic distribution system across the entire nation. Second, the pandemic has had a significant negative impact on supply and demand patterns for international trade. "Smart Logistics 4.0" was created to modernize technology-based logistics. As a result, trade processes between vendors, logistics services, and final consumers are greatly improved.
- Additionally, smart warehouses assist in lowering human errors that can be costly for building contractors and significantly raise operating expenses. Despite the pandemic, BGR Logistics contributed to the nation's economic recovery. BGR Logistics has developed several innovations, including smart warehouses, to advance Indonesia's logistics sector.
- Furthermore, as the number of users in Indonesia's e-commerce market is expected to grow in 2023, e-commerce is expected to increase the demand for warehouse automation. Notably, the market's user base has steadily increased over the past few years. The demand for digital commerce is rising as more consumers switch their purchasing habits to online platforms. With

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more consumers using their smartphones and tablets to make purchases, one of the market's prominent trends is the expanding use of mobile commerce.

- Moreover, Indonesia has one of the highest e-commerce adoption rates globally. Indonesia's e-commerce market value increased to USD 43 billion in 2021, making it the ninth largest in the world. Online sales in Indonesia's thriving e-commerce market grew by 23%, and there were about 63 million additional users. 90% of the country's internet users between 16 and 64 have purchased online. A change in consumer behavior among tech-savvy consumers willing to pay more for convenience is propelling the e-commerce market in Indonesia. Indonesia's e-commerce market has a bright future thanks to its youthful population, rising internet penetration, e-wallet boom, and policies geared toward the digital economy.

Southeast Asia Warehouse Automation Industry Overview

The Southeast Asia warehouse automation market is fragmented, with the presence of numerous regional and global players such as ALS Logistic Solutions, Dematic, DF Automation & Robotics Sdn. Bhd., Daifuku Co., Ltd., and Swisslog Holding AG, among others. These players continuously engage in strategic developments such as product launches, collaborations, partnerships, and mergers to gain market share and expand their business footprint.

In March 2023, Swisslog's CarryPick mobile robotic goods-to-person storage and retrieval system was released. The new, updated CarryPick mobile robotic platform offers a much faster working speed. The mobile robots also employ a revolutionary lifting turntable that allows them to turn a rack or hold the rack stationary as it turns, enabling quicker and more adaptable storage and selection processes for goods-to-person solutions.

Additional Benefits:

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

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