

Europe Automated Guided Vehicle (AGV) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

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Report description:

Europe Automated Guided Vehicle (AGV) Market Analysis

The European AGV market size is valued at USD 1.69 billion in 2025 and is projected to reach USD 2.92 billion by 2030, reflecting an 11.5% CAGR. Growth is driven by flexible manufacturing initiatives in the automotive sector, large-scale port automation programs, and sustained e-commerce expansion that demands high-throughput intralogistics. Lithium-ion powertrains, 5G-enabled fleet orchestration, and AI-based traffic management platforms are converging to raise overall equipment productivity while meeting EU decarbonization targets. Germany's automation leadership, the Netherlands' port projects, and the United Kingdom's response to acute labor shortages serve as powerful adoption catalysts, whereas fragmented RF spectrum and high integration costs still moderate deployment velocity.

Europe Automated Guided Vehicle (AGV) Market Trends and Insights

E-commerce fulfilment centres' surge across urban Europe

Rapid growth in urban fulfilment hubs is resetting AGV design priorities toward compact footprints and 24/7 availability. REWE Group's EUR 250 million logistics hub in Magdeburg automates 50% of intralogistics and handles 286,000 packages per day, proving the scale advantages of AGV-centric layouts. Specialty retailers follow suit; Dr. Max's new Italian warehouse uses mobile robots to sustain 55% online-sales growth. Combined with stabilizing logistics-real-estate vacancies, retailers now negotiate for automation-ready space that supports rapid AGV charging infrastructure.

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Industry 4.0-enabled flexible manufacturing lines in German automotive plants

German automakers are dismantling rigid conveyor lines in favor of matrix production orchestrated by AGV fleets. Mercedes-Benz's body-in-white operations run nearly 100 KUKA vehicles that autonomously synchronize component flows in real time. BMW's factory implementations rely on AI fleet control software to adapt transport routes to model-mix changes without downtime. Purpose-built paint-shop AGVs such as Durr's EcoProFleet expand the concept to finishing lines, allowing multiple vehicle types to run on shared resources.

High up-front system integration & customisation costs for SMEs

Many SMEs confront integration quotations exceeding EUR 49,000 for a modest two-AGV installation, stalling broader market penetration. Although payback can arrive within eight months in optimized layouts, limited in-house expertise and low awareness of subsidy programs leave uptake uneven. OECD surveys show 72% of European SMEs understand digital benefits, yet only 18% actively deploy advanced automation due to skills and funding gaps.

Other drivers and restraints analyzed in the detailed report include:

Labour-cost inflation & demographic shortages in Western Europe's logistics workforce / EU Green Deal incentives for low-emission intralogistics equipment / Fragmented European RF spectrum causing network latency in dense warehouses /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Automated forklifts captured 38% of the European AGV market share in 2024, underpinned by drop-in compatibility with existing pallet workflows and mature safety certifications. Tow tractors and tug vehicles remain staples in large manufacturing campuses, whereas assembly line platforms support just-in-time automotive sequencing. Unit-load carriers, propelled by e-commerce fulfilment needs, are forecast to grow at a 13.2% CAGR, increasing their contribution to the European AGV market size through 2030.

Technical evolution blurs legacy categories: KION's KANIS project demonstrates 5G-linked outdoor forklifts that coordinate with indoor fleets, extending automated coverage to yard areas. Toyota's alliance with Gideon blends forklift heritage with AI-driven AMRs, revealing how suppliers reposition toward adaptable multi-purpose platforms.

Laser guidance commanded 42% share in 2024 thanks to proven precision in structured aisles. Vision-guided vehicles, growing at 14.6% CAGR, leverage SLAM and sensor fusion to self-map unpredictable environments, reducing infrastructure retrofits. Magnetic and inductive paths persist in critical path-following use cases such as cold-chain tunnels. Free-navigation research at Fraunhofer IPA shows how hybrid vision-laser stacks eliminate fixed reflectors while preserving millimetric accuracy. Innok Robotics extends this model outdoors with LiDAR plus motion-tracker fusion for rough terrain.

The European AGV Market Report is Segmented by Vehicle Type (Automated Forklift, Unit-Load Carrier, and More), Navigation Technology (Laser Guided, Magnetic/Inductive Guided, and More), Battery Type (Lead-Acid, Lithium-Ion, Nickel-Metal Hydride, and More), Mode of Operation (Manual Override, Hybrid/Dual-Mode, and More), Application, End-User Industry, and Geography. The Market Forecasts are Provided in Terms of Value (USD).

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List of Companies Covered in this Report:

Swisslog Holding AG / KUKA AG / Jungheinrich AG / Toyota Material Handling Europe AB / Dematic (KION Group) / SSI Schaefer AG / Murata Machinery Ltd / ABB Ltd / Seegrid Corporation / AGILOX Services GmbH / Balyo SA / Elettric 80 SpA / Linde Material Handling GmbH / STILL GmbH / Mobile Industrial Robots (MiR) / Fives Intralogistics SAS / Euroimpianti SpA / Oceaneering International (AGV Systems) / Transbotics Corporation / Amerden Inc. /

Additional Benefits:

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

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Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

6.4.1 Swisslog Holding AG

6.4.2 KUKA AG

6.4.3 Jungheinrich AG

6.4.4 Toyota Material Handling Europe AB

6.4.5 Dematic (KION Group)

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