Southeast Asia Warehouse Automation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 115 pages | Mordor Intelligence

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Report description:

Southeast Asia Warehouse Automation Market Analysis

SEA warehouse automation market size in 2026 is estimated at USD 0.91 billion, growing from 2025 value of USD 0.81 billion with 2031 projections showing USD 1.63 billion, growing at 12.32% CAGR over 2026-2031. This expansion is underpinned by government-backed logistics parks in Indonesia and Vietnam that shorten payback periods for automated storage and retrieval systems, coupled with rising dark-store and quick-commerce models across Jakarta and Bangkok that require high-speed sortation capacity. Land scarcity and escalating wages in Singapore accelerate autonomous mobile-robot adoption as firms seek vertical storage density, while the RCEP agreement amplifies intra-regional e-commerce flows that push throughput requirements higher. Temperature-controlled pharmaceutical logistics is another tailwind, stimulated by data-center-led cold-chain investments in Malaysia and stringent mRNA vaccine handling standards. Meanwhile, fragmented power infrastructure and a shortage of certified mechatronics technicians temper growth but have not derailed overall investment momentum in the ASEAN warehouse automation market

Southeast Asia Warehouse Automation Market Trends and Insights

Government-funded logistics parks compress payback for AS/RS

Indonesia's Make Indonesia 4.0 roadmap and Vietnam's SuperPort initiative supply subsidized land, grid upgrades, and streamlined permits that shrink automated storage system payback horizons from seven to five years. The Dong Nai free-trade zone in Indonesia links airport and seaport access, removing retrofit premiums that typically add 20% to project costs. Thailand's USD 200 million logistics-training push illustrates spillover, positioning Bangkok as an integration hub. Vendors respond by localizing production and standardizing modules, accelerating deployment across the ASEAN warehouse automation market.

Land scarcity and rising labor costs spur mobile-robot adoption

Singapore's industrial land exceeds USD 400 per m□ and rents climb 15% annually, prompting firms to deploy autonomous mobile robots that work vertically and in narrow aisles. Government support via a SGD 60 million national robotics program nurtures startups such as Lionsbot and Eureka Robotics that tailor solutions for high-density sites. Malaysian developers emulate the model, as seen in CapitaLand Malaysia Trust's Elmina Logistics Hub featuring automated storage that trims staffing 40%. These blueprints spread to Manila and Bangkok, reinforcing regional demand within the ASEAN warehouse automation market.

Fragmented power & building codes hinder retrofits

Voltage swings of □15% outside Java and varying provincial building codes in the Philippines force expensive power-conditioning and compliance checks that prolong project approvals by up to 12 months. The ASEAN Power Grid plan, requiring USD 100 billion by 2045, aims to unify standards but progress remains gradual. These factors raise retrofit costs 15-25%, restraining smaller firms from joining the ASEAN warehouse automation market.

Other drivers and restraints analyzed in the detailed report include:

Dark-store and quick-commerce surge lifts micro-fulfillment demandRCEP-driven e-commerce volumes elevate throughput needsShortage of certified mechatronics technicians

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

Segment Analysis

Conveyor and sortation units maintained 23.60% of the ASEAN warehouse automation market share in 2025, underscoring their central role in high-throughput hubs. The ASEAN warehouse automation market size attributed to these systems is set to rise steadily as multinationals retrofit existing lines with smarter sensors and AI-based routing. Autonomous mobile robots, advancing at 14.36% CAGR, provide flexible capacity and integrate seamlessly into brownfield sites, which is critical for land-constrained Singapore and Kuala Lumpur. Mobile-robot vendors reduce costs through camera-only navigation, broadening adoption among mid-sized 3PLs.

Software is the connective tissue: warehouse management platforms that orchestrate conveyors, robots, and AS/RS lift overall utilization by 15%. PepsiCo's AS/RS investment in Thailand illustrates a hybrid conveyor-shuttle approach that raises pallet density while preserving fast pick cycles. As component prices decline, integrated solutions are becoming the default for new builds across the ASEAN warehouse automation market.

Retail and e-commerce stakeholders controlled 33.40% of revenue in 2025, and the segment's 17.28% CAGR reflects surging omnichannel demand. Same-day delivery commitments from super-apps force fulfillment centers to process peak orders in minutes, benefiting high-speed sorters and micro-fulfillment robots. Logistics carriers represent the second-largest slice, riding RCEP-enabled cross-border volumes that require customs-ready automation.

Healthcare and pharmaceutical firms pursue temperature precision and traceability, paying premium prices for AIDC and cold-chain robotics. DHL's USD 500 million Singapore pharma hub illustrates how pharma-grade zones spur high-margin system sales. Food and FMCG operators such as Betagro adopt similar automation for food safety. Together, these patterns diversify revenue streams in the ASEAN warehouse automation market.

The Southeast Asia Warehouse Automation Market is Segmented by Product Type (Conveyor/Sortation, AS/RS, and More), End-User (Retail, Logistics, Automotive, and More), Warehouse Size (Small, Medium, Large), Automation Level (Basic, Semi, and More), Temperature Zone (Ambient, Cold Chain, Controlled), Ownership(Third-Party Logistics (3PL), In-House, E-Commerce), Country. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

ALS Logistic Solutions AutoStore Holdings Daifuku Co., Ltd. Dematic Corp. (KION Group) DF Automation and Robotics Geek+ Gen Surv Robotics GreyOrange Pte Ltd Honeywell Intelligrated KNAPP AG Korber Supply Chain (Inconso / HighJump) Locus Robotics MHE-Demag (Konecranes) Omron Corporation PingSpace Sdn. Bhd. SSI Schaefer Sun and Siasun Robot Co., Ltd. Swisslog Holding AG (KUKA) System Logistics Asia (Krones Group) Vanderlande Industries

Additional Benefits:

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

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