

## **United States Cold Storage AGV Market Size and Share - Growth Analysis Report and Forecast Trends (2026-2035)**

Market Report | 2026-03-17 | 115 pages | EMR Inc.

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### **Report description:**

The United States cold storage AGV market was valued at USD 9.70 Million in 2025 . The industry is expected to grow at a CAGR of 48.30% during the forecast period of 2026-2035 to reach a value of USD 499.10 Million by 2035. The growing complexity of cold storage operations, which increasingly involve multiple temperature zones from chilled to frozen, is driving demand for AGV systems designed specifically for these environments.

Cold chain players demand automation solutions that are tolerant to low temperatures, as well as those that optimize their operations. Accordingly, cold chain solution providers are currently working to develop temperature-tolerant automation solutions, as well as multi-temperature solutions that are able to seamlessly coordinate inventory in cold storage environments with varied temperatures. For example, in 2025, Swisslog launched its AutoStore Multi Temperature Solution, which enables operations within various temperature environments in one automated system.

Moreover, Swisslog demonstrated their automation solutions specifically designed for cold storage at the event of CeMAT 2025, which is set to take place in July 2025. The event aims at improving throughput, as well as mitigating risks associated with manual processes, within refrigerated or frozen warehouses. The specific innovations made by focusing on such products not only make these environments safer but also expedite the adoption of AGVs in the United States cold storage industry.

### Key Trends and Recent Developments

May 2025 - EVERSANA establishes a cold storage distribution center in Memphis

EVERSANA launched its 358,000-square-foot cold storage facility in Memphis, Tennessee, incorporating Locus Robotics' Autonomous Mobile Robots (AMRs) into its refrigerated and frozen storage areas. This will enhance order accuracy, productivity, and compliance in pharmaceutical logistics, owing to an increasing adoption of AGV and AMR systems in the United States' cold

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storage facilities.

#### March 2025- Canada's Electrovaya Receives Repeated Battery Orders from a US-based Cold Storage Operator

Electrovaya received a repeat order of USD 4.2 million for batteries from a cold storage logistics provider in the United States for use in material-handling electric vehicles. The contract is a repeat order and has taken the total amount of purchases from that customer over USD 13 million and represents a growing interest in reliable lithium-ion battery technology for AGV and electric vehicles.

#### January 2024 - Arla Foods Improves Control of Cold Storage AGVs by Updating Software

Arla Foods improved intralogistics at a dairy center in Aylesbury with a changeover of control of cold storage management from an ERP system to ek robotics' control system for AGVs for a 90-vehicle AGV fleet, resulting in optimized flow management and a 25% increase in transport rate.

#### March 2023- Jungheinrich Introduces High-Rack Stacker AGV in United States of America

Mitsubishi Logisnext Americas unveiled its latest product, the Jungheinrich EKX 516ka/516a High-Rack Stacker AGV, specifically designed for very narrow aisle high-density warehouses. It allows automated pallet storage and retrieval 24/7, enabling continuous operation at cold storage warehouses in the United States.

#### Enhancement of AGV Production Facilities

There has been an increased focus on the automation of cold storage, which has increased the spur for AGV system sales, and as such, vendors have included raising production capacity in their plans to meet the demand for worldwide installation. In this regard, in an effort to meet this increased demand, Daifuku has completed the new AGV production factory in its Shiga Works in July 2025. The project aims to improve production flexibility and expand AGV assembly for pallet case and piece AGVs in response to market demand.

#### Collaborative Strategies for Implementing Future Warehouse Technology

The need to implement specialized material handling systems to increase throughput and reduce labor reliance has led to a growing collaboration between cold storage companies and automation firms. The latest such tie-up announced as recent as February 2025 is the collaboration between Swisslog and Vandenbulcke, where a state-of-the-art AutoStore Multi-Temperature system has been installed within a newly built 21,000 m<sup>2</sup> warehouse to handle both ambient and chilled inventory. The collaboration facilitates quick AGV-compatible automation system installation.

#### Display of Capabilities at Global Exhibitions

Industry conferences act as important platforms for automation suppliers that introduce their solutions adapted for the complex cold storage warehouse. At the Saudi Warehousing & Logistics Exposition that took place in May 2025, Swisslog demonstrated their scalable solutions for the cold chain industry, including temperature-critical automation solutions. Such demonstrations, through practical application scenarios, give confidence to operators that hasten the adoption process for investments in automation solutions for the ready operation of automatic guide vehicles.

#### Enhancing the AGV Ecosystem with Innovations from Autonomous Mobile Robots (AMRs)

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The improvement of self-driven mobile robots is complementary to the adoption of AGVs because it provides flexible materials transfer solutions amenable to the processes of cold storage units. For example, in January 2025, the Lift CR1 Autonomous Mobile Robot from Seegrid was showcased as one of the best auto handling solutions because it is capable of heavy lifting and towing, which can be used within an overall warehouse automation system. These improvements can therefore complement the market of AGVs by providing users with improved solutions.

#### Product Recognition Cements Market Confidence

Cold storage companies may need hard evidence of effectiveness before making any investment in automation solutions, thereby making product recognition a powerful indicator of this effect. In September 2025, Wiferion's CW1000 wireless charging solution received recognition as Industrial Product of the Year 2025, reflecting its contribution towards minimized downtime of AGVs and AMRs via inductive in-process charging, thereby enabling these vehicles to operate continuously without having to stop manually for battery replacement. This further proves that supporting technologies contribute towards increased efficiency of AGVs, making the use of automation a viable investment option even in cold storage companies.

#### United States Cold Storage AGV Industry Segmentation

The EMR's report titled "United States Cold Storage AGV Market Report and Forecast 2026-2035" offers a detailed analysis of the market based on the following segments:

##### Market Breakup by Type

- Reach Truck AGVs
- Very Narrow Aisle AGVs

**Key Insight:** The cold storage AGVs market is classified into Reach Truck AGVs and Very Narrow Aisle AGVs, each of which sustains different operational scenarios. The Reach Truck AGVs supplied by firms such as Dematic ensure counterbalanced and freezer-rated navigation solutions that aid pallet handling and ensure higher efficiency and safety in cold storage. On the other hand, Very Narrow Aisle AGVs supplied by firms such as Swisslog and Daifuku ensure higher rack densities and automated navigation solutions.

##### Market Breakup by Temperature Range

- 0C to -18 C
- -18C to -25C
- Less than -25C

**Key Insight:** Cold storage AGV systems range from 0C to -18C, -18C to -25C, and below -25C. Features in these systems may include the use of batteries and robust components. Dematic's freezer-rated AGVs support continuous operation in sub-zero temperatures with improved reliability in the range of -18C to -25C. Swisslog's modularity and Toyota Industries Traigo range improve functionality of the systems in the range of chilled to ultra-cold areas.

##### Market Breakup by Application

- Food and Beverages
- Pharmaceutical
- E-Commerce

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- Others

Key Insight: The cold storage AGV industry caters to food and beverages, pharmaceutical, e-commerce, and other industries, and this is because of their automated process. Dematic and Swisslog provide cold chain solutions for perishable foods with AGVs and warehouse solutions. Daifuku and Toyota Industries provide solutions for cold chain logistics in pharmaceuticals, which require precision and tracing. E-commerce fulfillment centres use AGVs for faster processing, and other industries like chemicals use automated solutions for increased safety.

#### Market Breakup by Region

- Texas
- California
- Pennsylvania
- Washington
- Others

Key Insight: The adoption of cold storage AGVs is also gaining traction in Texas, California, Pennsylvania, and other states in the United States, given the growing warehousing infrastructure. Dematic's freezer-rated AGVs are deployed in national distribution centers, whereas Swisslog's automation solutions are involved in multi-temperature operations from one coast of the United States to another. Daifuku and Toyota Industries are also expanding their product offerings of AGVs by partnering with local logistics companies. R&D investments in customized solutions for AGVs have increased productivity in temperature-controlled logistics centers.

#### United States Cold Storage AGV Market Share

By type, reach truck AGVs witness high demand

Cold storage facilities increasingly rely on Reach Truck AGVs to efficiently manage high-rack storage with reduced labor dependence. The vendors are offering more dynamic products; for instance, Dematic introduced its novel RTS120 Reach Truck Series AGV in November 2025, which provides autonomous pallet handling and integrated navigation in multi-level warehouse environments. This, therefore, enhances throughput, safety, and space utilization, enabling operators to scale operations in chilled and frozen zones without infrastructure overhauls.

In the denser cold storage, VNA AGVs deliver maximum storage with high throughput. To meet ever-growing demand, TotalWarehouse partnered with Dematic in 2025 to introduce VNA AGVs capable of automated aisle navigation and precise pallet handling. These solutions reduce reliance on labor while improving safety and boosting efficiency in space-constrained facilities, reflecting the market's push for compact, intelligent automation systems.

By temperature range, 0C to -18°C category is showing significant uptake

Cold storage operations between 0C and -18°C call for thermal protection and reliable navigation. In May 2025, Geekplus launched its SkyCube multi-zone pallet-to-person system in Jinjiang Cold Logistics, which could transfer the pallets across chilled and frozen zones while raising picking efficiency and storage density. These types of innovations enable operators to further optimize workflow, reduce the need for manual intervention, and ensure consistency in performance even for perishable goods in moderately cold warehouses.

Less than -25°C or ultra-low temperature cold storage requires automation that will work in extremely sub-zero conditions where

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human exposure is hazardous and expensive. To this end, JBT introduced at the ProMatDX 2025 its Warehouse Freezer AGV designed to continuously function within the -10°F-to-freezer temperatures, enhancing autonomous pallet movements while minimizing manual interventions of critical frozen logistics workflows. This also reflects growing investment currently seen in freezer-capable AGV systems for extreme cold chain applications.

By application, the food and beverages sector records notable growth

Automation is playing an increasingly bigger role in U.S. cold storage food operations, as companies look to increase throughput, safety, and efficiencies in the process within chilled and frozen environments. For instance, in September 2025, Americold's Russellville automated facility in Arkansas was named Refrigerated & Frozen Foods Magazine's first-ever Cold Storage Facility of the Year. This facility leads in implementing high-volume food distribution with advanced automated storage/retrieval, integrated warehouse management technologies, and trailer unloading systems. This obviously points to how automation enhances productivity and quality in food cold chain logistics .

Temperature-sensitive pharmaceutical logistics require precise handling, traceability, and adherence to regulations. For such, automation solutions integrate AGVs with digital inventory and fleet management systems. In late 2024, Gather AI extended its inventory intelligence platform to freezer and cold storage environments, real-time monitoring, and automated handling of biologics and vaccines. This reduces human error, increases throughput, and guarantees the following regulations, underlining the interaction between robotics and smart inventory management in the cold chain for pharmaceuticals.

#### United States Cold Storage AGV Market Regional Analysis

By region, Texas demonstrates a notable growth rate

Texas's cold storage market is seeing strategic investments as operators move to strengthen regional infrastructure and capacity. Recently, in March 2025, Americold invested USD 127 million to acquire a facility with 10.7 million cubic feet of cold storage in Houston, including an addition of 35,700 pallet positions and adjacent land for expansion. Such investments are reflective of commitments to underpin retail and refrigerated supply chains with scalable logistics capacity and improve the readiness of the cold chain while laying foundations for the integration of automation in the future.

California remains a key hub for cold chain innovation, with major logistics companies expanding facilities to manage perishable goods and automation integration. Lineage Inc. expanded its Hobart, Indiana automated cold storage facility in November 2025, adding approximately 188,000 square feet and 58,000 pallet positions with next-generation automation technology to serve customers throughout the Midwest and West Coast, including California markets. This expansion exemplifies the regional trend toward automated, high-capacity cold storage to meet growing demand.

#### Competitive Landscape

Leading United States cold storage AGV market players are actively expanding production capabilities and developing temperature-adapted automation portfolios to meet growing demand. Companies like Daifuku and Swisslog are investing in new manufacturing facilities and multi-temperature solutions, enabling faster delivery, operational flexibility, and efficient handling across chilled and frozen zones, reflecting a strong focus on innovation and scalability to address complex cold chain requirements.

Strategic partnerships and collaborative deployments are central to market growth, with vendors aligning with cold storage operators to implement advanced AGV and AMR systems. Initiatives such as Swisslog's collaborations with Vandenbulcke demonstrate integrated approaches that optimize storage density, throughput, and labor efficiency. Additionally, participation in

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global exhibitions and recognition for product innovations further reinforce adoption, signaling the market's commitment to reliability, performance, and next-generation cold storage automation.

#### JBT Marel Corporation

JBT Marel Corporation is a global technology solutions provider serving food, beverage, and logistics industries, established through the integration of complementary automation and processing expertise. Established with headquarters in Chicago, Illinois, the company delivers advanced automated systems and digital solutions that support efficient, end-to-end cold chain operations.

#### Dematic Group Ltd.

Dematic Group Ltd. is a leading intralogistics automation specialist offering AGVs, AS/RS, and warehouse execution software for complex supply chains. Established in 1819 and headquartered in Atlanta, Georgia, Dematic has built a strong global presence by delivering scalable automation solutions across cold storage, manufacturing, and distribution environments.

#### Anhui Yufeng Int. Tech Co., Ltd.

Anhui Yufeng Int. Tech Co., Ltd. is a China-based automation company specializing in AGVs, intelligent warehousing systems, and logistics integration solutions. Established in 2005 and headquartered in Wuhu, Anhui Province, the company supports cold storage and industrial customers with customized, technology-driven material handling solutions.

#### E80 Group Spa

E80 Group Spa is an industrial automation company focused on intralogistics solutions for food, beverage, and consumer goods supply chains. Established in 1992 and headquartered in Viano, Italy, the company delivers integrated AGV, robotic, and software platforms designed to optimize high-throughput and temperature-controlled logistics operations.

Other players in the market include Multiway Robotics Co., Ltd., among others.

#### Key Highlights of the United States Cold Storage AGV Market Report

- Historical Performance and Forecasts: The report extensively covers the historical market trends with day, to, day accuracy and gives a clear picture of the market until 2035. It makes it easy for the shareholders to understand the future growth and the areas where they can invest.
- Product Innovation Insights: The report discusses a wide range of technological solutions such as freezer, rated AGVs, multi, zone pallet, to, person systems, and an integrated warehouse automation system that shows how innovations are leading to operational efficiency and stability.
- Competitive Landscape Profiling: The report exposes what the domestic and international market leaders like Dematic, Swisslog, JBT, and Geekplus, are up to by analyzing their product portfolios, strategic initiatives, and market positioning.
- Regional Analysis: The detailed review of major United States regions such as Texas, California, Pennsylvania, Washington, and others helps to understand the new hubs, investments in the infrastructure, and the regional adoption patterns for cold storage automation.
- Investment, Focused Outlook: Market intelligence backed up by quantitative data serves the purpose of investors in finding out where the growth opportunities are located, what the potential risks are, and how to come up with capital allocation strategies in the expanding AGV cold storage sector.

#### Why Choose Expert Market Research?

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- The insights provided are dependable because they are derived from an extensive primary and secondary research process that ensures data accuracy and reliability.
- The actionable intelligence allows companies to make well-thought-out strategic and operational decisions.
- The region, wise and product-specific analyses are beneficial for a targeted market entry, expansion, and competitive benchmarking.

#### Call to Action

Explore the latest trends shaping the United States Cold Storage AGV Market 2026-2035 with our in-depth report. Gain strategic insights, future forecasts, and key market developments that can help you stay competitive. Download a free sample report or contact our team for customized consultation on United States cold storage AGV market trends 2026 .

#### **Table of Contents:**

- 1 Executive Summary
  - 1.1 Market Size 2025-2026
  - 1.2 Market Growth 2026(F)-2035(F)
  - 1.3 Key Demand Drivers
  - 1.4 Key Players and Competitive Structure
  - 1.5 Industry Best Practices
  - 1.6 Recent Trends and Developments
  - 1.7 Industry Outlook
- 2 Market Overview and Stakeholder Insights
  - 2.1 Market Trends
  - 2.2 Key Verticals
  - 2.3 Key Regions
  - 2.4 Supplier Power
  - 2.5 Buyer Power
  - 2.6 Key Market Opportunities and Risks
  - 2.7 Key Initiatives by Stakeholders
- 3 Economic Summary
  - 3.1 GDP Outlook
  - 3.2 GDP Per Capita Growth
  - 3.3 Inflation Trends
  - 3.4 Democracy Index
  - 3.5 Gross Public Debt Ratios
  - 3.6 Balance of Payment (BoP) Position
  - 3.7 Population Outlook
  - 3.8 Urbanisation Trends
- 4 Country Risk Profiles
  - 4.1 Country Risk
  - 4.2 Business Climate
- 5 North America Cold Storage AGV Market Analysis
  - 5.1 Key Industry Highlights
  - 5.2 North America Cold Storage AGV Historical Market (2019-2025)

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- 5.3 North America Cold Storage AGV Market Forecast (2026-2035)
- 6 United States Cold Storage AGV Market Analysis
  - 6.1 Key Industry Highlights
  - 6.2 United States Cold Storage AGV Historical Market (2019-2025)
  - 6.3 United States Cold Storage AGV Market Forecast (2026-2035)
  - 6.4 United States Cold Storage AGV Market by Type
    - 6.4.1 Reach Truck AGVs
      - 6.4.1.1 Historical Trend (2019-2025)
      - 6.4.1.2 Forecast Trend (2026-2035)
    - 6.4.2 Very Narrow Aisle AGVs
      - 6.4.2.1 Historical Trend (2019-2025)
      - 6.4.2.2 Forecast Trend (2026-2035)
  - 6.5 United States Cold Storage AGV Market by Temperature Range
    - 6.5.1 0C to -18 C
      - 6.5.1.1 Historical Trend (2019-2025)
      - 6.5.1.2 Forecast Trend (2026-2035)
    - 6.5.2 -18C to -25C
      - 6.5.2.1 Historical Trend (2019-2025)
      - 6.5.2.2 Forecast Trend (2026-2035)
    - 6.5.3 Less than -25C
      - 6.5.3.1 Historical Trend (2019-2025)
      - 6.5.3.2 Forecast Trend (2026-2035)
  - 6.6 United States Cold Storage AGV Market by Application
    - 6.6.1 Food and Beverages
      - 6.6.1.1 Historical Trend (2019-2025)
      - 6.6.1.2 Forecast Trend (2026-2035)
    - 6.6.2 Pharmaceutical
      - 6.6.2.1 Historical Trend (2019-2025)
      - 6.6.2.2 Forecast Trend (2026-2035)
    - 6.6.3 E-Commerce
      - 6.6.3.1 Historical Trend (2019-2025)
      - 6.6.3.2 Forecast Trend (2026-2035)
    - 6.6.4 Others
  - 6.7 United States Cold Storage AGV Market by Region
    - 6.7.1 Texas
      - 6.7.1.1 Historical Trend (2019-2025)
      - 6.7.1.2 Forecast Trend (2026-2035)
    - 6.7.2 California
      - 6.7.2.1 Historical Trend (2019-2025)
      - 6.7.2.2 Forecast Trend (2026-2035)
    - 6.7.3 Pennsylvania
      - 6.7.3.1 Historical Trend (2019-2025)
      - 6.7.3.2 Forecast Trend (2026-2035)
    - 6.7.4 Washington
      - 6.7.4.1 Historical Trend (2019-2025)
      - 6.7.4.2 Forecast Trend (2026-2035)
    - 6.7.5 Others

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- 7 Market Dynamics
  - 7.1 SWOT Analysis
    - 7.1.1 Strengths
    - 7.1.2 Weaknesses
    - 7.1.3 Opportunities
    - 7.1.4 Threats
  - 7.2 Porter's Five Forces Analysis
    - 7.2.1 Supplier's Power
    - 7.2.2 Buyer's Power
    - 7.2.3 Threat of New Entrants
    - 7.2.4 Degree of Rivalry
    - 7.2.5 Threat of Substitutes
  - 7.3 Key Indicators of Demand
  - 7.4 Key Indicators of Price
- 8 Investments in Cold Storage and AGV Technology
  - 8.1 Investments in Cold Storage Facilities
  - 8.2 Investments in AGV Technology
- 9 AGV Value Chain Analysis
  - 9.1 Key Stakeholders
  - 9.2 Stages in the Value Chain
- 10 Critical Technical Specifications for Cold Storage AGVs
  - 10.1 Key Technical Requirements for AGVs in Cold Storage by Application
  - 10.2 Required Design Modifications in AGVs To Operate at Sub-Zero Temperature
  - 10.3 Battery Technology and Performance
  - 10.4 Key Technical and Economic Barriers
  - 10.5 AGV Workflow in Cold Storage Warehouse
  - 10.6 Challenges and Solutions for AGV Temperature Resistance, Battery Life and Charging Infrastructure
- 11 Critical Compliance Standards for Cold Storage AGVs
  - 11.1 Regulatory Environment for Cold Chain
  - 11.2 Safety and Environmental Standards Affecting AGV Use
  - 11.3 ASTM Regulations for AGVs
- 12 Competitive Landscape
  - 12.1 Supplier Selection
  - 12.2 Market Share of Key Players in AGV Market
  - 12.3 Competitive Positioning of Key AGV Market Players
  - 12.4 Key Player Strategies
  - 12.5 AGV Testing & Validation in Cold Environments
  - 12.6 Company Profile
    - 12.6.1 JBT Marel Corporation
      - 12.6.1.1 Company Overview
      - 12.6.1.2 Product Portfolio
      - 12.6.1.3 Demographic Reach and Achievements
      - 12.6.1.4 Certifications
    - 12.6.2 Dematic Group Ltd.
      - 12.6.2.1 Company Overview
      - 12.6.2.2 Product Portfolio
      - 12.6.2.3 Demographic Reach and Achievements

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- 12.6.2.4 Certifications
- 12.6.3 Anhui Yufeng Int. Tech Co., Ltd.
  - 12.6.3.1 Company Overview
  - 12.6.3.2 Product Portfolio
  - 12.6.3.3 Demographic Reach and Achievements
  - 12.6.3.4 Certifications
- 12.6.4 E80 Group Spa
  - 12.6.4.1 Company Overview
  - 12.6.4.2 Product Portfolio
  - 12.6.4.3 Demographic Reach and Achievements
  - 12.6.4.4 Certifications
- 12.6.5 Multiway Robotics Co., Ltd.
  - 12.6.5.1 Company Overview
  - 12.6.5.2 Product Portfolio
  - 12.6.5.3 Demographic Reach and Achievements
  - 12.6.5.4 Certifications
- 12.6.6 Others

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