



**INTERACT
ANALYSIS**

A new vision of
Intelligent Automation

The Future of Warehouse Automation - 2019

August 2019





Record low unemployment levels in Europe and North America, along with the growing consumer demand for fast, flexible and low-cost shipping is forcing retailers, logistics providers and manufacturers to invest in warehouse automation equipment resulting in double-digit growth across the industry.

The Future of Warehouse Automation – 2019 provides an in-depth assessment of the market at an unprecedented level of granularity forecasting the market by region, country, end-user industry, channel, function, storage-type and project size. Furthermore, the report provides detailed discussions and commentary on emerging technology trends such as robotics, modular and flexible solution design, drone technology, and digitisation. Lastly, an in-depth competitor analysis is provided with market shares at the regional and industry level, along with insight and analysis on the competitive landscape and how this is changing.

During our six-month research period, Interact Analysis interviewed and surveyed over 40 of the leading warehouse automation system integrators, suppliers and end-users, to build an accurate and holistic understanding of the market and its growth potential.

“The warehouse automation market is going through a very exciting period of growth, driven by a growing consumer demand for shorter delivery times and the rising complexity and convergence of today’s distribution channels.”

Key Findings

The warehouse automation market is forecast to grow at a CAGR of 12.6% to reach \$46 billion in 2023. APAC accounts for the lion share of the market and is forecast to grow at a CAGR of 13.7%, above the industry average. Interact Analysis forecasts a short-term decline in revenue growth between 2020 and 2021 as companies look to post-pone financial decisions amid the political and economic uncertainties.

As the installed base of automated warehouses increases, the high-margin revenues from servicing and maintenance contracts are forecast to grow at a CAGR of 17.2%.

Piece-picking warehouse robots are forecast to grow at a CAGR of 98.7%, made possible by significant improvements in machine vision, gripping technology and mobile navigation technology. Industries with predictable item dimensions, such as apparel and healthcare distribution, will be some of the first to adopt the technology at scale.

Manufacturing and production, which includes food & beverage, durable and non-durable manufacturing, accounted for 30% of the warehouse automation market in 2018 and its share of the market is forecast to decrease to 28% in 2023 as the demand for automation equipment within distribution verticals outpaces the manufacturing and production verticals.

The demand for online grocery shopping in the US is driving the shift towards automated micro-fulfilment technology. We forecast the global micro-fulfilment market will surpass \$1.1 billion by 2023.

Manufacturers and producers have been late to the game in designing effecting e-commerce strategies. As they look



to capitalise on the ‘direct-to-customer’ distribution channel, we expect to see more manufacturers and producers shipping individual items and investing in omni-channel distribution facilities.

With the likes of Amazon, Alibaba and JD.com investing in automated warehouse equipment, the general merchandise segment is largest industry vertical and is forecast to grow at a CAGR of 13.4%

The introduction of the goods-and-service tax and growing demand for online retail is enabling Indian companies to consolidate their warehousing operations and driving the Indian warehouse automation market which is forecast to grow at a CAGR of 14.9%.

There’s a growing demand for modular and flexible storage and buffer solutions. Interact Analysis forecasts growth of 61.5% and 28.5%, respectively, for AMR-based goods-to-person and ultra-high-density storage systems.

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Market Segmentation

Warehouse Automation Market by Region

- EMEA
- Americas
- APAC

Warehouse Automation Market by End-User Industry

- General Merchandise
- Parcel
- Fashion/Apparel
- Groceries
- Food & Beverage
- Durable Manufacturing
- Non-Durable Manufacturing
- Other

Warehouse Automation Market by Function

- Storage/Buffering
 - Mini-load AS/RS
 - Unit-load AS/RS
 - Shuttle-based AS/RS

- VLM
- Ultra-High-Density Storage (AutoStore)
- AMR-based goods-to-person (Kiva-like systems)
- Sortation
- Palletizing/Depalletizing
- Robotic Picking
 - Fixed Robot
 - Collaborative Robot
 - Mobile Robot
- Transportation
 - Conveyor
 - Mobile Robot
- Software
- Servicing

Warehouse Automation Market by Channel

- To-Store
- To-Customer
- To-DC
- Omni-Channel
- Micro-fulfilment (Grocery-specific)

Warehouse Automation Market by Project Size

- <\$5m
- \$5m- \$20m
- \$21m - \$40m
- \$40m>

Warehouse Automation Market by Country

- China
- India
- Japan
- USA
- UK
- Germany
- Italy
- France
- Rest of Europe
- Rest of Americas
- Rest of APAC
- Middle East & Africa

Market Share Analysis at the Regional and Industry Level



About Us

Interact Analysis provides industry-leading market intelligence to the **Intelligent Automation** sector. Our team of vastly experienced analysts enable us to provide the highest quality data and expert analysis.

We offer a number of market intelligence services based on primary research. Our industry expertise combined with vast experience in statistical analysis provides you with reliable, trusted intelligence that enables you to make decisions with confidence.

Interact Analysis aims to provide a holistic and comprehensive view of the Intelligent Automation industry with wide-coverage and yet detailed analysis and insight. Our current coverage through market reports and subscription services includes industrial automation, warehouse automation, robotics and commercial vehicles.

Deliverables & Pricing

Deliverables:

- **Comprehensive Excel Database**
- **PDF Report**
- **Analyst Time to Discuss Findings**

Price:

\$10,000 / €8,900 / £7,600

We offer a flexible approach to pricing to accommodate companies of different size. Any company grossing <\$100M in revenue annually will receive a 40% discount off the price.

To find out more about purchasing this study please contact us at info@interactanalysis.com

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