

Automated Guided Vehicle Market - Global Outlook and Forecast 2020-2025

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Abstracts

The global automated guided vehicle market is expected to grow at a CAGR of over 46% during the period 2020–2025.

The following factors are likely to contribute to the growth of the automated guided vehicle market during the forecast period:

Rising automation in material handling

Increasing demand for higher productivity and flexibility in the production process

Increasing demand for AI in factories

SMEs to dominate adoption of automated guided vehicles

The demand for automatic guided vehicles (AGV), which enhance the logistics movement with minimal manual intervention, in automation, retail, and food & beverage (F&B) application segments is driving the market. Advanced technologies such as automatic truck-unloading and improved safety systems, coupled with high productivity, are the other major factors responsible for automated guided vehicles demand. The growth in the e-commerce industry is expected to enhance the efficiency of warehousing operations, along with the reduction in the product damages is likely to increase the usage of material handling equipment, such as AGVs. Warehouse managers are expected to focus on the latest automatic guided vehicle techniques to minimize the manual labor expenditure, improve retrieval and storage tasks, and

streamline material transport, full-case palletizing, and carton picking. However, the growing popularity of self-driving vehicles and the availability of low-cost labors are expected to inhibit AGV growth in emerging countries.

The study considers the present scenario of the automated guided vehicle market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

Automated Guided Vehicle Market: Segmentation

This research report includes a detailed segmentation by product, Application, Navigation, and geography. The increasing demand for efficient movement with large loads capacity for long and short distances is expected to drive the demand for tow vehicles. These vehicles are considered to be economical as multiple loads can be moved from place to another, thereby resulting in productivity and eliminating the usage of manual trains or fork trucks. The unit load AGVs are likely to grow at the fastest CAGR as these vehicles offer the flexibility of automatic load transfers. They are a viable option to cover long distances and perform repetitive tasks. Unit load AGVs are autonomous, which helps to improve the worker's safety. Forklift trucks are used to lift and move goods over shorter distances. These vehicles can lift loads from the floor as well as from stands. Moreover, the increasing shift toward digital factories is expected to favorably impact the adoption of automated forklift trucks during the forecast period.

The growing complexity of vehicles, along with stringency in safety norms and emission standards, is likely to propel automotive sector manufacturers to invest in automatic guided vehicles. The application of AGVs helps automotive companies to reduce operational costs, which enables them to offer high-quality products at competitive prices. Moreover, to increase the safety in operational services, several vendors are expected to emphasize on the usage of AGVs.

Automatic guided vehicles in the retail segment are expected to grow at a rapid rate. The swift growth of online sales in the retail sector and the increasing usage of AGVs in warehouses enable companies to offer speedy product delivery. They are being adopted in the food and beverages, and the segment is expected to grow at a rapid rate sector owing to their ability to handle palletized and unit loads of goods and packaging materials in the cross-docking, manufacturing, trailer loading, and warehousing environments. The growth of online food ordering is expected to put immense pressure

on retailers for timely product delivery. Moreover, the usage of AGVs in the F&B segment is expected to increase cost-effectiveness and reduce product damage and spillage.

The laser guidance segment is likely to grow at a significant pace. The laser guidance technology helps the vehicle to operate efficiently and automatically, which provides flexibility in manufacturing and warehouse facilities. The natural guidance segment is projected to grow at the fastest CAGR as these types of automatic guided vehicles are easy to implement and do not require retrofitting of the workspace. As these vehicles combine laser range finders and gyroscope to determine the location and calculate the shortest path, they are likely to gain prominence in dynamic workplaces. Inductive guidance systems are expected to grow considerably in the application segments such as aerospace, industrial plants, and automotive segments as they are not sensitive to oil, tire abrasion, dirt, and require low maintenance. The increasing usage of magnetic guided AGVs in the food and beverage, warehousing, and manufacturing industries is expected to drive the sale of automated guided vehicles during the forecast period.

Market Segmentation by Product

AGCs

Tow Vehicles

Unit Load Vehicles

Pallet Trucks

Other AGVs

Market Segmentation by Application

Automobile

Retail

Food & Beverage

Healthcare

Aerospace

Others

Market Segmentation by Navigation

Natural Guidance

Laser Guidance

Inductive Guidance

Magnetic Guidance

Vision Guidance

Others

Insights by Geography

North America is one of the major regions for the adoption of automatic guided vehicles and is likely to dominate the market during the forecast period. The growth is expected to be largely on account of the increasing adoption of automation systems, revitalization of the US economy, and the growth of the e-commerce industry. The growth of the automated guided vehicle market in North America largely depends on the political and economic scenario in the region, along with the growing adoption of automation in industries. Besides, the growth of the e-commerce industry in North America is expected to induce higher sales of AGVs during the forecast period. In Europe, the market is likely to grow as this region is a leading exporter and producer of automated guided vehicles. The increasing demand for high-end quality goods at competitive pricing, coupled with intense market competition, is expected to propel several industries to implement for automatic guided vehicles. The growing demand for smart technology is expected to promote the introduction of automated solutions in several warehousing facilities in the market. The APAC market is expected to witness robust growth due to the rise in regional economies and the increase in manufacturing units by global OEMs. The region has emerged as the manufacturing hub with the highest

adoption rate of industrial robots, which are likely to drive the demand for automatic guided vehicles. China is considered to be the largest e-commerce driven country in the world, and the e-commerce sector is expected to witness a boom in the region.

Market Segmentation by Geography

North America

US

Canada

Europe

UK

Germany

France

Spain

Italy

Nordic

APAC

China

Japan

Australia

South Korea

Latin America

Brazil

Mexico

Argentina

MEA

South Africa

Saudi Arabia

UAE

Insights by Vendors

The global AGV market is highly concentrated with the presence of several local and global players. The market is expected to witness intense competition. Automated guided vehicle manufacturers are likely to emphasize on identifying market opportunities, thereby setting up certain goals to achieve productivity and efficient usage of capital resources. One of the key strategies expected to be implemented by market players includes the introduction of differentiated products and solutions. Hence, companies strive to offer differentiated channels for distribution and better product mix, thereby catering to changing consumer needs in the market. Key manufacturers are likely to offer and expand the product line-up in their business segments with the launch of several innovative techniques, thereby gaining an edge over their competitors. Manufacturers are expected to rely on key competitive factors such as reliability and quality, product innovation, product support, pricing, warranty, distribution, financing options, and shelf space.

Key Vendors

Daifuku

JBT Corporation

Kion Group

Toyota Industries

Other Vendors

AGVE Group

Amerden

America in Motion

AMS ASTI Mobile Robotics Group

Atab

Axter Automation

BA Systems

Comau

DimaSimma

DS Automation

Echcart

EK Automation

Esatroll

Eurogroep

Fetch Robotics

Fori Automation

Grenzebach Group

GreyOrange

Hi-Tech Robotic Systemz

Hyster-Yale Group

Inser Rob?tica

iROB

Jungheinrich

Kivnon Logistica

Kollmorgen

Kuka

Mad Automation

Mecalux

MLR System

Mitsubishi Forklift Trucks

Murata Machinery

Oceaneering

Optimus Robotics

Bastian Solutions

Robotic Automation

Robotnik Automation

Savant Automation

Scaglia INDEVA

Scallog

SCOTT

Seegrid

Simplex Products

Solving

SSI SCHAEFER

Synersight

Technoferrari

Teradyne

Transolt Technologies

WEWO Techmotion

Quirepace

Key Market Insights

The analysis of the automated guided vehicle market provides sizing and growth opportunities during the period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the

automated guided vehicle market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.

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