

Global AGV / AMR Controllers and Navigation Control Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AGV / AMR Controllers and Navigation Control Systems market size is expected to reach \$ 955 million by 2032, rising at a market growth of 18.5% CAGR during the forecast period (2026-2032).

AGV / AMR controllers and navigation control systems are the core control layer that enables industrial mobile robots to move autonomously, execute missions, operate safely, and coordinate with other vehicles and factory systems. This research focuses on on-board robot controllers, vehicle controllers, navigation controllers, localization and mapping software, motion-control algorithms, safety and I/O modules, communication interfaces, mission-execution software, and fleet-control platforms used in automated guided vehicles, autonomous mobile robots, autonomous forklifts, tugger robots, under-ride robots, conveyor-top mobile robots, and collaborative mobile robot platforms. Typical product forms include embedded robot controllers, industrial PC-based control units, ROS/ROS 2-based AMR software platforms, SLAM navigation systems, natural feature navigation systems, VDA 5050-based heterogeneous fleet control platforms, fleet managers, traffic control systems, and software interfaces connected to WMS, MES, ERP, PLCs, doors, elevators, chargers, conveyors, and production equipment. Their core functions include mapping, localization, path planning, replanning, speed and pose control, obstacle avoidance, actuator control, traffic management, task allocation, status monitoring, and remote operations.

Based on our research, the AGV / AMR controller market should not be interpreted as a simple hardware-controller market. It is increasingly a system-level control layer that combines on-board real-time control, localization and navigation algorithms, safety interfaces, device communication, and fleet-level coordination. In the traditional AGV

era, the controller mainly handled path following, drive control, I/O integration, and basic mission execution. As AMRs, autonomous forklifts, and hybrid fleets become more widely deployed, the control layer must support SLAM mapping, natural feature navigation, dynamic obstacle avoidance, path replanning, actuator coordination, wireless communication, charger and elevator interfaces, and real-time status reporting. This is why the practical industry boundary now extends from vehicle controllers to navigation control systems, fleet managers, VDA 5050-based heterogeneous fleet control, and AMR software stacks. For market sizing, we use a narrow scope focused on controllers and control software supplied to AGV/AMR OEMs, system builders, or end-user automation projects, while excluding complete mobile robots, generic industrial PCs, standalone sensors, and integration-service revenue.

Demand growth is driven by the shift from fixed-route automation to flexible, software-defined material handling. Automotive, electronics, lithium battery, semiconductor, pharmaceutical, food and beverage, and third-party logistics applications are the most important demand sources. Legacy AGV systems remain relevant in high-payload, repetitive, and automotive-line-side applications, while new projects increasingly require flexible deployment, minimal infrastructure modification, mixed-fleet coordination, and fast commissioning. This favors SLAM, natural navigation, hybrid navigation, Visual SLAM, and vendor-independent fleet-control solutions. Autonomous forklifts and heavy-duty AMRs also raise the value of the controller because they require more robust safety integration, high-precision localization, load-aware vehicle dynamics, and reliable actuator coordination. At the same time, standardized Chinese controllers are expanding the addressable market but putting downward pressure on low-end ASPs.

The most important medium-term trend is openness. VDA 5050, the MassRobotics AMR Interoperability Standard, ROS 2, and Open-RMF are gradually changing customer expectations. End users want to operate multiple robot brands in one facility without being locked into one proprietary fleet manager. This favors suppliers with open interfaces, simulation tools, deployment software, and remote operations capability. For controller vendors, stable single-vehicle control remains the foundation, but future differentiation will come from software ecosystems, interoperability, data feedback, remote diagnostics, AI-enabled traffic optimization, and the ability to support multiple robot form factors. The main competitive risks are vertical integration by robot OEMs and the downward move of general automation platforms, but dedicated controller vendors should remain relevant where speed of integration, vehicle-model compatibility, and low engineering effort matter most.

This report studies the global AGV / AMR Controllers and Navigation Control Systems

production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AGV / AMR Controllers and Navigation Control Systems and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AGV / AMR Controllers and Navigation Control Systems that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AGV / AMR Controllers and Navigation Control Systems total production and demand, 2021-2032, (Units)

Global AGV / AMR Controllers and Navigation Control Systems total production value, 2021-2032, (USD Million)

Global AGV / AMR Controllers and Navigation Control Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global AGV / AMR Controllers and Navigation Control Systems consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: AGV / AMR Controllers and Navigation Control Systems domestic production, consumption, key domestic manufacturers and share

Global AGV / AMR Controllers and Navigation Control Systems production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global AGV / AMR Controllers and Navigation Control Systems production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global AGV / AMR Controllers and Navigation Control Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global AGV / AMR Controllers and Navigation Control Systems market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Siemens AG, Bosch Rexroth AG, ABB Ltd, Regal Rexnord Corporation, Beckhoff Automation GmbH & Co. KG, KUKA AG, Advantech Co., Ltd., ADLINK Technology Inc., ZAPI Group, SEER Robotics, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AGV / AMR Controllers and Navigation Control Systems market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AGV / AMR Controllers and Navigation Control Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AGV / AMR Controllers and Navigation Control Systems Market, Segmentation by Type:

On-board Vehicle Controller

Navigation Controller

Other

Global AGV / AMR Controllers and Navigation Control Systems Market, Segmentation by Navigation Method:

Laser SLAM Navigation

QR Code Navigation

Magnetic Navigation

Hybrid Navigation

Other

Global AGV / AMR Controllers and Navigation Control Systems Market, Segmentation by Deployment Mode:

Server-based Deployment

Cloud-based Deployment

Hybrid Deployment

Other

Global AGV / AMR Controllers and Navigation Control Systems Market, Segmentation by Control Openness:

Closed Proprietary Control

Semi-open Control Platform

Open-interface Control Platform

Other

Global AGV / AMR Controllers and Navigation Control Systems Market, Segmentation by Application:

Line-side Delivery

Tugging Operation

Heavy-load Transport

Other

Companies Profiled:

Siemens AG

Bosch Rexroth AG

ABB Ltd

Regal Rexnord Corporation

Beckhoff Automation GmbH & Co. KG

KUKA AG

Advantech Co., Ltd.

ADLINK Technology Inc.

ZAPI Group

SEER Robotics

Zhejiang KC Robotics Co., Ltd.

Zhejiang COTEC Robotics Co., Ltd.

CONTEC Co., Ltd.

Axiomtek Co., Ltd.

Guidance Automation Ltd

Navitec Systems Oy

SYNAOS GmbH

KINEXON GmbH

MOV.AI

Movel AI

SIGMATEK GmbH & Co KG

Phoenix Contact GmbH & Co. KG

G?tting KG

Brain Corporation

Cyngn Inc.

Rapyuta Robotics Co., Ltd.

InOrbit, Inc.

Chengdu Intellichiprobot Technology Co., Ltd.

Shenzhen EGO Robotics Co., Ltd.

Shanghai BITO Robotics Co., Ltd.

idealworks GmbH

Key Questions Answered:

1. How big is the global AGV / AMR Controllers and Navigation Control Systems market?
2. What is the demand of the global AGV / AMR Controllers and Navigation Control Systems market?
3. What is the year over year growth of the global AGV / AMR Controllers and Navigation Control Systems market?
4. What is the production and production value of the global AGV / AMR Controllers and Navigation Control Systems market?
5. Who are the key producers in the global AGV / AMR Controllers and Navigation Control Systems market?
6. What are the growth factors driving the market demand?

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