

Global Intelligent Warehouse Picking System Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Intelligent Warehouse Picking System market size was valued at US\$ 20877 million in 2025 and is forecast to a readjusted size of US\$ 39516 million by 2032 with a CAGR of 9.7% during review period.

An intelligent warehouse picking system is an integrated hardware and software system designed for warehouse order fulfillment, store replenishment, manufacturing line-side feeding, and multi-SKU outbound operations. Its core purpose is to reduce walking time, minimize mis-picks and missed picks, increase picking throughput, and improve space utilization in high-SKU, high-frequency, small-batch, and time-sensitive warehouse environments. The system is typically composed of automated storage and retrieval equipment, mobile robots, shuttles, totes or shelf carriers, picking workstations, light- or voice-directed guidance, machine-vision robotic arms, conveyor and sortation equipment, and software layers such as WMS, WES, WCS, or RCS. It forms a closed loop across order release, inventory location, task decomposition, path planning, carrier dispatching, workstation guidance, verification, and exception handling. Typical forms include goods-to-person picking, tote-to-person picking, shelf-to-person picking, robotic piece picking, light-directed picking, and hybrid automated picking. The system is used in e-commerce, retail, third-party logistics, pharmaceuticals, food cold chain, apparel and footwear, manufacturing spare parts, and cross-border fulfillment. Commercial delivery usually combines automation projects, robotic systems, software platforms, workstations, and long-term operations and maintenance services. Key customer metrics include picking accuracy, order-line throughput per hour, storage density, payback period, system scalability, and the difficulty of retrofitting existing warehouses.

The industrial value of intelligent warehouse picking systems is shifting from replacing manual work with individual devices to systematically restructuring the order fulfillment architecture. In traditional warehouses, major inefficiencies come from workers walking long distances between shelves, relying on paper lists or handheld terminals to verify SKUs, adding temporary labor during peak periods, and repeatedly moving goods during verification, consolidation, and packing. New-generation systems use goods-to-person, tote-to-person, shelf-to-person, mobile robot-assisted picking, and robotic piece picking as core execution methods. Through WMS, WES, WCS, and RCS, they create a unified scheduling loop across orders, inventory, equipment, workstations, and people, allowing inventory to be automatically delivered according to task priority while humans or robotic arms focus on higher-value confirmation, grasping, verification, and exception handling. The result is not simply labor reduction, but the release of workers from non-value-added walking and repetitive handling into quality control, exception management, equipment monitoring, and process optimization. As fulfillment networks expand from large central warehouses to regional warehouses, store-front fulfillment nodes, micro-fulfillment centers, and manufacturing line-side warehouses, competition will shift from single-robot performance to total throughput, wave adaptability, storage density, software openness, and continuous service capability.

The technology roadmap for intelligent warehouse picking systems will remain multi-modal over the long term, rather than being dominated by one single type of equipment. For e-commerce and apparel warehouses with high SKU variety, fragmented orders, and strong time requirements, tote-to-person, shelf-to-person, and mobile AS/RS systems are better suited to improving picking efficiency with high flexibility. For high-throughput distribution centers with stable SKU profiles and large-scale operations, systems composed of shuttles, stacker cranes, conveyors, sortation equipment, and fixed workstations still provide strong efficiency and reliability advantages. In pharmaceuticals, electronics, cosmetics, and small-item retail, where high accuracy is required, light-directed picking, scan verification, visual recognition, and batch traceability are more likely to generate clear returns. For customers seeking to further reduce manual touchpoints, machine-vision robotic arms and mobile manipulators are gradually taking on piece picking, consolidation, replenishment, and buffering tasks, but they still require engineering optimization around packaging formats, grasping stability, exception handling, and system takt time. Therefore, the future market will not be divided simply into manual and unmanned models. Instead, it will form combined solutions based on carrier type, automation level, storage structure, software layer, and application scenario. Supplier competitiveness will increasingly depend on end-to-end capabilities in system selection, simulation planning, software integration, on-site implementation, and long-term operations support.

From a market outlook perspective, intelligent warehouse picking systems have strong medium- and long-term growth visibility. E-commerce and instant retail are increasing the share of small-batch, high-frequency, short-lead-time orders. Chain retail and pharmaceutical distribution require higher inventory accuracy and batch traceability. Manufacturing companies aim to reduce downtime risks through line-side feeding, automated replenishment, and spare parts management. At the same time, many global regions face warehouse labor shortages, rising labor costs, higher warehouse rents, and greater supply chain volatility, pushing customers to improve output per square meter and output per worker instead of simply expanding warehouse space. Against this backdrop, competition will move from whether a system can automate picking to whether it can be deployed quickly in existing warehouses, adapt to complex SKUs, integrate reliably with enterprise systems, and continuously improve operating metrics. Suppliers with coordinated capabilities in robot hardware, software platforms, system integration, and service networks will be better positioned to secure cross-regional replication and long-term orders from major customers.

This report is a detailed and comprehensive analysis for global Intelligent Warehouse Picking System market. Both quantitative and qualitative analyses are presented by company, by region & country, by Picking Flow and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Intelligent Warehouse Picking System market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Intelligent Warehouse Picking System market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Intelligent Warehouse Picking System market size and forecasts, by Picking Flow and by Application, in consumption value (\$ Million), 2021-2032

Global Intelligent Warehouse Picking System market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Intelligent Warehouse Picking System

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Intelligent Warehouse Picking System market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include AutoStore AS, Daifuku Co., Ltd., Murata Machinery, Ltd., KNAPP AG, KION Group AG, KUKA AG, Toyota Industries Corporation, SSI Schaefer Group, Honeywell International Inc., Vanderlande Industries B.V., etc.

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

Market segmentation

Intelligent Warehouse Picking System market is split by Picking Flow and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Picking Flow and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Picking Flow

Person-to-Goods Assisted Picking System

Goods-to-Person Picking System

Robots-to-Goods Picking System

Fully Automated Lights-Out Picking System

Other

Market segment by Automation Form

Human-Guided Picking System

Semi-Automated Collaborative Picking System

Fixed Automated Picking System

Mobile Robotic Automated Picking System

Other

Market segment by Execution Technology

Light-Directed Picking System

Voice-Directed Picking System

Mobile Robot Orchestrated Picking System

Machine Vision Robotic Arm Picking System

Other

Market segment by Storage Structure

Floor Rack Picking System

High-Bay Rack Picking System

Shuttle-Based Dense Storage Picking System

Cube-Based Dense Storage Picking System

Other

Market segment by Application

E-Commerce Order Fulfillment

Retail Store Replenishment

Third-Party Logistics Fulfillment

Manufacturing Line-Side Feeding

Pharmaceutical and Medical Distribution

Food and Fresh Cold Chain

Apparel and Footwear Sorting

Spare Parts and Aftermarket Supply

Other

Market segment by players, this report covers

AutoStore AS

Daifuku Co., Ltd.

Murata Machinery, Ltd.

KNAPP AG

KION Group AG

KUKA AG

Toyota Industries Corporation

SSI Schaefer Group

Honeywell International Inc.

Vanderlande Industries B.V.

TGW Logistics Group GmbH

Kardex Holding AG

Mecalux, S.A.

Modula S.p.A.

Exotec SAS

Locus Robotics Corporation

GreyOrange Pte. Ltd.

Brightpick Inc.

Berkshire Grey, Inc.

Symbotic Inc.

Addverb Technologies Limited

System Logistics S.p.A.

Tompkins Robotics, Inc.

Doosan Logistics Solutions Co., Ltd.

ASETEC Co., Ltd.

Beijing Geekplus Technology Co., Ltd.

Shenzhen Hai Robotics Co., Ltd.

Shanghai Quicktron Intelligent Technology Co., Ltd.

Megvii Robotics

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Intelligent Warehouse Picking System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Intelligent Warehouse Picking System, with revenue, gross margin, and global market share of Intelligent Warehouse Picking System from 2021 to 2026.

Chapter 3, the Intelligent Warehouse Picking System competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Picking Flow and by Application, with consumption value and growth rate by Picking Flow, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Intelligent Warehouse Picking System market forecast, by regions, by Picking Flow and

by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Intelligent Warehouse Picking System.

Chapter 13, to describe Intelligent Warehouse Picking System research findings and conclusion.

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