

Global Intelligent Warehouse Picking System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Intelligent Warehouse Picking System market size is expected to reach \$ 39516 million by 2032, rising at a market growth of 9.7% CAGR during the forecast period (2026-2032).

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 studies the global Intelligent Warehouse Picking System demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Intelligent Warehouse Picking System, 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 Intelligent Warehouse Picking System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Intelligent Warehouse Picking System total market, 2021-2032, (USD Million)

Global Intelligent Warehouse Picking System total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Intelligent Warehouse Picking System total market, key domestic companies, and share, (USD Million)

Global Intelligent Warehouse Picking System revenue by player, revenue and market share 2021-2026, (USD Million)

Global Intelligent Warehouse Picking System total market by Picking Flow, CAGR, 2021-2032, (USD Million)

Global Intelligent Warehouse Picking System total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Intelligent Warehouse Picking System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Picking Flow, 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 Intelligent Warehouse Picking System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Intelligent Warehouse Picking System Market, Segmentation 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

Global Intelligent Warehouse Picking System Market, Segmentation by Automation Form:

Human-Guided Picking System

Semi-Automated Collaborative Picking System

Fixed Automated Picking System

Mobile Robotic Automated Picking System

Other

Global Intelligent Warehouse Picking System Market, Segmentation by Execution Technology:

Light-Directed Picking System

Voice-Directed Picking System

Mobile Robot Orchestrated Picking System

Machine Vision Robotic Arm Picking System

Other

Global Intelligent Warehouse Picking System Market, Segmentation 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

Global Intelligent Warehouse Picking System Market, Segmentation 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

Companies Profiled:

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

Key Questions Answered

1. How big is the global Intelligent Warehouse Picking System market?
2. What is the demand of the global Intelligent Warehouse Picking System market?
3. What is the year over year growth of the global Intelligent Warehouse Picking System market?
4. What is the total value of the global Intelligent Warehouse Picking System market?
5. Who are the Major Players in the global Intelligent Warehouse Picking System market?
6. What are the growth factors driving the market demand?

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