

# Global Piece Picking Robot Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Piece Picking Robot market size is expected to reach \$ 8653 million by 2032, rising at a market growth of 13.2% CAGR during the forecast period (2026-2032).

Piece picking robots refer to intelligent robotic systems deployed in warehousing and fulfillment environments that integrate robotic manipulators, machine vision, end-of-arm tooling, and warehouse management systems to autonomously identify, grasp, and place individual items at the order level. These systems are widely applied in e-commerce fulfillment centers, retail distribution hubs, pharmaceutical warehouses, and spare parts logistics. Their industrial value lies not in a single hardware form factor, but in the deep integration of robotics, software, and warehouse workflows that replaces labor-intensive “person-to-goods” operations. As SKU proliferation, order fragmentation, and delivery time expectations intensify, single-item picking has become one of the most complex and cost-sensitive processes in modern warehouses, positioning piece picking robots as a critical enabler of automation-driven transformation.

Market opportunities for piece picking robots are driven by structural forces rather than short-term technology cycles. Labor availability challenges, high turnover in warehouse operations, and rising operational risks have pushed enterprises toward automation to stabilize fulfillment capacity. At the same time, omnichannel retail and direct-to-consumer models demand high-frequency, small-batch, multi-SKU order handling, a requirement that traditional conveyor-based automation struggles to meet. Continuous advances in machine vision, grasping algorithms, and robotic control have improved the technical feasibility of generalized piece picking. However, high system integration complexity, SKU diversity, and reliability requirements impose significant engineering and operational challenges, favoring suppliers with strong long-term deployment and

service capabilities. Within the supply chain, piece picking robots sit at the intersection of robotics hardware, sensing and computing components, software intelligence, and warehouse system integration. Upstream segments include industrial and collaborative robot arms, vision sensors, end effectors, and control platforms, most of which originate from established automation industries. Downstream demand is concentrated among large e-commerce operators, third-party logistics providers, retailers, and high-throughput manufacturers, where procurement decisions typically favor turnkey solutions over standalone equipment. In practice, companies with strong system integration expertise have been more successful in commercial deployments, including specialized picking robot developers as well as established intralogistics and automation groups that embed picking capabilities into broader warehouse solutions. From an application perspective, demand for piece picking robots is strongly scenario-driven. E-commerce and retail fulfillment centers remain the most prominent use cases due to complex order structures and significant peak variability that require high operational flexibility. Warehousing for pharmaceuticals, electrical components, and industrial spare parts, where accuracy, traceability, and operational stability are critical, is emerging as an important expansion area. Rather than fully unmanned warehouses, many current deployments adopt human–robot collaboration models, integrating picking robots into existing workflows to reduce implementation risk and shorten adoption cycles, a trend that continues to shape product design and delivery strategies. Regionally, adoption pathways differ markedly. In North America, demand is led by large e-commerce and logistics enterprises that emphasize system-level automation and scalable deployment, often supported by long-term capital investment. European markets place stronger emphasis on labor regulations, workplace safety, and energy efficiency, driving a more incremental approach that prioritizes compatibility with existing warehouse infrastructure. China and the broader Asia-Pacific region benefit from rapid e-commerce growth and evolving fulfillment networks, with strong local integration and manufacturing capabilities facilitating practical deployment. Other emerging regions remain in an exploratory phase, where applications are typically limited to pilot projects and partial implementations. Over the past five years, several notable industry developments have shaped the trajectory of piece picking robots. Around 2020, multiple specialized picking robot companies entered acquisitions or strategic partnerships with major logistics and automation groups, reflecting long-term confidence in picking capabilities. Between 2021 and 2023, leading global e-commerce and retail companies repeatedly highlighted automation and robotics in official statements and annual reports as key tools for improving fulfillment efficiency and worker safety, with picking operations identified as a priority area. Since 2024, policy documents in several major economies addressing intelligent manufacturing, logistics infrastructure, and supply chain resilience have explicitly supported warehouse automation and robotic adoption,

creating a more favorable institutional environment for the continued deployment of piece picking robots.

This report studies the global Piece Picking Robot production, demand, key manufacturers, and key regions.

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

### **Highlights and key features of the study**

Global Piece Picking Robot total production and demand, 2021-2032, (K Units)

Global Piece Picking Robot total production value, 2021-2032, (USD Million)

Global Piece Picking Robot production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Piece Picking Robot consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Piece Picking Robot domestic production, consumption, key domestic manufacturers and share

Global Piece Picking Robot production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Piece Picking Robot production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Piece Picking Robot production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Piece Picking Robot 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 Swisslog Holding AG, inVia Robotics, Inc., Movu Robotics, Pelican Robotics, Brightpick, Inc., Symbotic Inc., GreyOrange Pte. Ltd., RightHand Robotics, Inc., Plus One Robotics, Inc., XYZ Robotics, Inc., 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 Piece Picking Robot market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K 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 Piece Picking Robot Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Piece Picking Robot Market, Segmentation by Type:

Collaborative

Mobile

Others

#### Global Piece Picking Robot Market, Segmentation by System Architecture:

Stationary Robotic Cells

Mobile Robotic Systems

Global Piece Picking Robot Market, Segmentation by Robotic Manipulator Type:

Articulated Arm Robots

SCARA Robots

Global Piece Picking Robot Market, Segmentation by Application:

Logistics

Distribution Centers

General Warehouse

Companies Profiled:

Swisslog Holding AG

inVia Robotics, Inc.

Movu Robotics

Pelican Robotics

Brightpick, Inc.

Symbotic Inc.

GreyOrange Pte. Ltd.

RightHand Robotics, Inc.

Plus One Robotics, Inc.

XYZ Robotics, Inc.

Movi Robotics

Renatus Robotics

MIWA Robotics

Interlake Mecalux

Agility Robotics

Covariant

Addverb Technologies

Mujin Inc.

Handplus Robotics

Kinova Robotics

Geek+ Technology Co., Ltd.

Quicktron Intelligent Technology Co., Ltd.

Hikrobot Co., Ltd.

Locus Robotics

Geek Robotics

### **Key Questions Answered:**

1. How big is the global Piece Picking Robot market?
2. What is the demand of the global Piece Picking Robot market?
3. What is the year over year growth of the global Piece Picking Robot market?

4. What is the production and production value of the global Piece Picking Robot market?
5. Who are the key producers in the global Piece Picking Robot market?
6. What are the growth factors driving the market demand?

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