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Global Warehouse Picking Robots Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Warehouse Picking Robots market size was valued at US$ 576 million in 2025 and is forecast to a readjusted size of US$ 5462 million by 2032 with a CAGR of 37.1% during review period.

Warehouse picking robots are robotic systems and integrated picking cells deployed in warehouses, distribution centers, and fulfillment facilities to autonomously identify, grasp, retrieve, transfer, and place individual items, cases, parcels, or totes. This study focuses on robots that perform a physical picking or retrieval action, including fixed articulated robots, gantry robots, mobile manipulation robots, and mobile retrieval robots. Typical systems combine the robot body with 3D vision or other perception, end effectors, motion-planning and control software, safety functions, and interfaces to WMS, WES, or AS/RS platforms. Key purchasing parameters include handled unit, payload, pick rate, SKU coverage, pick success rate, reach, gripper architecture, system availability, retrofit requirements, and software integration capability. Major demand comes from e-commerce and retail, third-party logistics, food and beverage, pharmaceuticals and healthcare, electronics and electrical, and automotive and industrial manufacturing warehouses. The blended gross margin is approximately 35%.

Market Trends

Warehouse picking robots are moving from pre-defined SKUs, fixed grasp points, and single-purpose grippers toward more general manipulation systems built around 3D vision, deep learning, vision-language-action models, and online exception recovery. Automatic tool changing, multi-cup vacuum systems, and flexible gripping are

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expanding coverage across bags, boxes, bottles, and irregular products. Mobile manipulation robots are combining locomotion, perception, and grasping on one platform and connecting with tote-to-person systems, AutoStore, shuttles, and other AS/RS architectures. Customer evaluation is also shifting from peak single-pick speed toward hourly throughput, first-pick success, SKU coverage, unattended runtime, exception handling, and deployment speed.

Drivers

Faster e-commerce fulfillment, rising warehouse labor costs, difficulty staffing night and peak shifts, and the need for stable throughput and low mis-pick rates are the main demand drivers. Continued advances in AI vision, 3D perception, end effectors, and motion planning are lowering the automation barrier for high-mix picking, while wider adoption of AS/RS and WES platforms provides more standardized material and software interfaces for robotic cells.

Restraints

High SKU variability, transparent or reflective packaging, soft bags, fragile products, and random clutter can still reduce pick success and increase exception-handling requirements. High-performance perception, robot hardware, grippers, computing, and integration keep upfront investment meaningful, while differences in totes, racks, conveyors, and software interfaces across warehouses limit complete product standardization.

Opportunities

Case picking, mobile manipulation, multi-shift operations in pharmaceuticals and food, and modular retrofit projects in existing warehouses are among the clearest growth opportunities. As vision-language-action models, generalized grasp policies, and automatic tool changing mature, addressable SKU coverage should expand further and allow robotic platforms to move into adjacent workflows such as replenishment, returns, consolidation, and pre-packing handling.

Challenges

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The supplier base remains fragmented and technology routes continue to evolve quickly, so customers are placing greater emphasis on vendor financial stability, long-term maintenance capability, and proven multi-site deployment experience. Project approvals can lengthen when system availability, exception recovery, or total cost of ownership does not consistently outperform labor or conventional automation. At the same time, hardware standardization and low-cost competition may compress unit value and shift profit pools toward software, operational data, and lifecycle services.

Industry Chain Analysis

Upstream suppliers provide industrial or collaborative robot arms, mobile bases, servo systems, reducers, 3D cameras and depth sensors, edge-computing platforms, suction and mechanical grippers, safety sensors, and electrical controls. Midstream vendors integrate perception, grasp planning, motion control, exception recovery, and task orchestration into picking cells and connect them with WMS, WES, conveyors, goods-to-person systems, and AS/RS. Downstream customers are mainly warehouses and distribution centers with high SKU counts, frequent order lines, or multi-shift operations. As robot arms and general hardware become more standardized, value creation is increasingly concentrated in AI perception and manipulation software, real-world operating data, end-effector reliability, system integration, and lifecycle support.

Segment Insights

By handled unit, piece picking remains technically demanding and offers substantial long-term potential because robots must cope with wide variations in shape, material, and packaging. Case picking is seeing faster commercial adoption because cases are more regular and each automated pick replaces relatively labor-intensive work. Mobile manipulation combines travel and grasping and can reduce dependence on fixed conveyors and dedicated stations, but it raises requirements for navigation, dynamic safety, arm stability, and battery endurance. Fixed robotic cells remain important because they offer high cycle rates, mature guarding concepts, and reliable interfaces with established warehouse automation.

Downstream Market Opportunities

E-commerce, retail, and third-party logistics remain the most typical demand sectors because they combine high SKU diversity, volatile peaks, and multi-shift fulfillment. Food and beverage and pharmaceutical warehouses place greater value on traceability,

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hygiene, and reduced manual contact, while electronics, electrical, and automotive warehouses emphasize part identification, tote compatibility, and integration with production logistics. Platforms that can be reused across customers with limited re-engineering and parameter changes are better positioned to scale across sites.

Regional Insights

North America is one of the most active demand regions for warehouse robotic picking, supported by high labor costs, large e-commerce and 3PL networks, and continued automation investment. Europe benefits from labor scarcity, high wages, and a mature installed base of warehouse automation, which supports demand for picking cells that can integrate quickly with existing AS/RS. Asia Pacific has a major robotics manufacturing and supply-chain base, with Chinese vendors particularly competitive in mobile robotics, 3D vision, and system cost, although regional capital spending is more cyclical. Future regional growth will increasingly depend on local service networks, integration partners, and the ability to replicate solutions across multiple sites.

Competitive Landscape Analysis

Competition includes specialized robotic-picking companies, established intralogistics groups, robot manufacturers, and AI software providers. The key competitive factors extend beyond arm speed to addressable SKU range, real-world pick success, hourly throughput, system availability, exception recovery, and integration efficiency with upstream storage and downstream conveying. As customers place more weight on supplier continuity and multi-site service capability, companies with mature references, global support networks, and stable partner ecosystems are better positioned for large-account procurement. At the same time, deeper separation between software and hardware is increasing partnerships between AI manipulation platforms, robot suppliers, and system integrators.

Report Scope

This report is a detailed and comprehensive analysis for global Warehouse Picking Robots market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as

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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 Warehouse Picking Robots market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global Warehouse Picking Robots market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global Warehouse Picking Robots market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global Warehouse Picking Robots market shares of main players, shipments in revenue ($ Million), sales quantity (Units), and ASP (US$/Unit), 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 Warehouse Picking Robots

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 Warehouse Picking Robots market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Geek+, Hai Robotics, Brightpick,

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RightHand Robotics, Nomagic, XYZ Robotics, TGW Logistics, SSI Schaefer, KNAPP, Swisslog, etc.

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

Warehouse Picking Robots market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Piece Picking

Case Picking

Parcel Picking

Tote/Bin Picking

Others

Market segment by Robot Configuration

Fixed Articulated Robot

Gantry Robot

Mobile Manipulation Robot

Mobile Retrieval Robot

Others

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Market segment by Payload Capacity

Up to 5 kg

>5–20 kg

>20–50 kg

>50 kg

Market segment by Picking Mechanism

Vacuum Gripping

Mechanical Gripping

Hybrid/Tool-Changing Gripping

Fork/Lift Handling

Others

Market segment by Application

E-commerce and Retail

Third-Party Logistics

Food and Beverage

Pharmaceuticals and Healthcare

Electronics and Electrical

Automotive and Industrial Manufacturing

Others

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Major players covered

Geek+

Hai Robotics

Brightpick

RightHand Robotics

Nomagic

XYZ Robotics

TGW Logistics

SSI Schaefer

KNAPP

Swisslog

Mujin

ABB Robotics

OSARO

Sereact

Berkshire Grey

robominds

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

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Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

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

Chapter 2, to profile the top manufacturers of Warehouse Picking Robots, with price, sales quantity, revenue, and global market share of Warehouse Picking Robots from 2021 to 2026.

Chapter 3, the Warehouse Picking Robots competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Warehouse Picking Robots breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Warehouse Picking Robots market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

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Chapter 13, the key raw materials and key suppliers, and industry chain of Warehouse Picking Robots.

Chapter 14 and 15, to describe Warehouse Picking Robots sales channel, distributors, customers, research findings and conclusion.

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