

Global AGV / AMR Controllers and Navigation Control Systems Market Growth 2026-2032

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Abstracts

The global AGV / AMR Controllers and Navigation Control Systems market size is predicted to grow from US\$ 274 million in 2025 to US\$ 962 million in 2032; it is expected to grow at a CAGR of 19.6% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "AGV / AMR Controllers and Navigation Control Systems Industry Forecast" looks at past sales and reviews total

world AGV / AMR Controllers and Navigation Control Systems sales in 2025, providing a comprehensive analysis by region and market sector of projected AGV / AMR Controllers and Navigation Control Systems sales for 2026 through 2032. With AGV / AMR Controllers and Navigation Control Systems sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AGV / AMR Controllers and Navigation Control Systems industry.

This Insight Report provides a comprehensive analysis of the global AGV / AMR Controllers and Navigation Control Systems landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AGV / AMR Controllers and Navigation Control Systems portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AGV / AMR Controllers and Navigation Control Systems market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AGV / AMR Controllers and Navigation Control Systems and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AGV / AMR Controllers and Navigation Control Systems.

This report presents a comprehensive overview, market shares, and growth opportunities of AGV / AMR Controllers and Navigation Control Systems market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

On-board Vehicle Controller

Navigation Controller

Other

Segmentation by Navigation Method:

Laser SLAM Navigation

QR Code Navigation

Magnetic Navigation

Hybrid Navigation

Other

Segmentation by Deployment Mode:

Server-based Deployment

Cloud-based Deployment

Hybrid Deployment

Other

Segmentation by Control Openness:

Closed Proprietary Control

Semi-open Control Platform

Open-interface Control Platform

Other

Segmentation by Application:

Line-side Delivery

Tugging Operation

Heavy-load Transport

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global AGV / AMR Controllers and Navigation Control Systems market?

What factors are driving AGV / AMR Controllers and Navigation Control Systems market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AGV / AMR Controllers and Navigation Control Systems market opportunities vary by end market size?

How does AGV / AMR Controllers and Navigation Control Systems break out by Type, by Application?

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