

Automated Guided Vehicle (AGV) Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Automated Guided Vehicle (AGV) Market Summary

Introduction to the Automated Guided Vehicle (AGV) Industry

Automated Guided Vehicles (AGVs) are autonomous mobile robots used for material handling and transportation in industries like automotive, manufacturing, and logistics. AGVs enhance operational efficiency by automating repetitive tasks, reducing labor costs, and improving safety. The industry is driven by Industry 4.0, e-commerce growth, and the need for flexible automation, with core components like reducers, servo systems, and controllers accounting for over 75% of costs. AGVs range from simple tow vehicles to sophisticated units with AI and IoT integration, enabling real-time navigation and fleet management. The market is fragmented, with global leaders like Daifuku and regional players like Guangzhou Jaten competing on technology and customization. Innovations focus on autonomous mobile robots (AMRs), energy-efficient designs, and integration with warehouse management systems, as seen in SSI Schaefer's acquisition of DS AUTOMOTION in 2023 to bolster its AMR portfolio.

Market Size and Growth Forecast

The global AGV market is projected to reach USD 6 billion to USD 7 billion by 2025, with an estimated compound annual growth rate (CAGR) of 10% to 12% through 2030, driven by automation trends, e-commerce expansion, and smart manufacturing adoption.

Regional Analysis

Asia Pacific expects a growth rate of 11% to 13%. China leads with its manufacturing and e-commerce sectors, with Siasun driving AGV adoption. Japan focuses on precision AGVs for automotive applications.

North America anticipates a growth rate of 9% to 11%. The U.S. dominates with logistics and automotive demand, while Canada's smaller manufacturing base grows steadily.

Europe projects a growth rate of 10% to 12%. Germany and the Netherlands lead in logistics automation, with SSI Schaefer advancing smart AGVs. The UK targets healthcare applications.

South America expects a growth rate of 7% to 9%. Brazil's logistics sector drives demand, though economic volatility limits scalability.

Middle East and Africa anticipate a growth rate of 6% to 8%. The UAE invests in smart logistics, but limited infrastructure hinders broader adoption.

Application Analysis

Automotive: Projected at 10% to 12%, automotive AGVs dominate for assembly line automation, with Daifuku leading in flexible systems.

Manufacturing: Expected at 9% to 11%, manufacturing AGVs support smart factories, with Dematic focusing on IoT integration.

Logistics: Anticipated at 11% to 13%, logistics AGVs drive e-commerce efficiency, with SSI Schaefer advancing AMRs.

Food & Beverages: Projected at 8% to 10%, AGVs ensure hygiene and efficiency, with JBT targeting cold chain logistics.

Healthcare: Expected at 9% to 11%, healthcare AGVs automate hospital logistics, with KUKA leading in sterile environments.

Paper & Print: Anticipated at 7% to 9%, AGVs streamline material handling, with ROFA targeting niche solutions.

Others: Projected at 6% to 8%, niche applications like aerospace grow steadily, with Grenzebach serving specialized needs.

Key Market Players

Daifuku: A Japanese leader, Daifuku provides AGVs for automotive and logistics, emphasizing smart automation.

SSI Schaefer: A German innovator, SSI Schaefer advances AMRs for logistics, bolstered by its DS AUTOMOTION acquisition.

Dematic: A U.S. firm, Dematic specializes in AGVs for warehouses, focusing on IoT and AI integration.

JBT Corporation: A U.S. company, JBT develops AGVs for food and beverage logistics, targeting efficiency.

KUKA Group: A German robotics giant, KUKA offers AGVs for manufacturing and healthcare, emphasizing precision.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate. High R&D costs deter entry, but declining component costs lower barriers. Daifuku's scale limits new players, though startups target niche AMRs.

Threat of Substitutes: Moderate. Manual labor and forklifts compete, but AGVs' efficiency gives SSI Schaefer an edge. AMRs pose an internal substitute threat.

Bargaining Power of Buyers: High. Manufacturers and retailers negotiate due to multiple suppliers. Dematic's customization stabilizes demand, but buyers demand cost efficiencies.

Bargaining Power of Suppliers: High. Component suppliers for reducers and controllers influence costs, impacting JBT. Vertical integration by KUKA mitigates risks.

Competitive Rivalry: High. Daifuku, SSI Schaefer, and Dematic compete on technology, cost, and scalability. Rapid e-commerce and Industry 4.0 trends

drive R&D, intensifying rivalry.

Market Opportunities and Challenges

Opportunities

E-Commerce Growth: Rising online retail boosts SSI Schaefer's logistics AGVs.

Industry 4.0: Smart manufacturing drives Daifuku's AGV adoption.

Healthcare Automation: KUKA's sterile AGVs meet hospital needs.

Emerging Markets: India's logistics growth offers JBT export potential.

Energy Efficiency: Grenzebach's low-power AGVs align with sustainability.

AMR Advancements: Dematic's AMR innovations enhance flexibility.

Policy Support: EU automation incentives favor SSI Schaefer's expansion.

Challenges

High Component Costs: Reducers and controllers pressure Daifuku's margins.

Integration Complexity: System interoperability challenges SSI Schaefer's scalability.

Labor Resistance: Automation fears impact Dematic's adoption in some regions.

Supply Chain Volatility: Component shortages disrupt JBT's production.

Regulatory Variability: Safety standards increase KUKA's compliance costs.

Talent Shortages: Specialized skills limit Grenzebach's innovation pace.

Economic Uncertainty: Volatility hinders Dematic's emerging market growth.

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