

Automated Storage & Retrieval Systems Software Market Forecasts to 2034 – Global Analysis By Software Type (Warehouse Control Software, Warehouse Management Software, Inventory Management Software, Robotics Control Software, Material Flow Software and Other Software Types), System Type, Software Capability, Deployment, End User, and Geography

<https://marketpublishers.com/r/A1122CD6DCCCEN.html>

Date: June 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: A1122CD6DCCCEN

Abstracts

According to Statistics MRC, the Global Automated Storage & Retrieval Systems Software Market is accounted for \$2.1 billion in 2026 and is expected to reach \$5.4 billion by 2034 growing at a CAGR of 12.5% during the forecast period. Automated Storage & Retrieval Systems Software consists of control, warehouse execution, optimization, and management applications used to operate automated storage and retrieval equipment. The software coordinates storage locations, retrieval requests, robotic systems, cranes, shuttles, conveyors, lifts, and other warehouse equipment. It determines where goods should be stored and manages retrieval sequences based on inventory status, order priorities, equipment availability, and warehouse conditions. Applications span manufacturing facilities, distribution centers, e-commerce warehouses, retail operations, and temperature-controlled storage. Integration with warehouse management and enterprise resource planning systems provides inventory and order information needed for coordinated operations. Growing demand for high-density storage and automated fulfillment is driving adoption. AI-based optimization, real-time equipment monitoring, and predictive maintenance are further improving system efficiency.

Market Dynamics

Driver:

Growing demand for storage density and space optimization

Escalating land and facility costs in urban and near-urban locations are driving adoption of high-density automated storage systems that maximize cubic utilization of warehouse space. Growing e-commerce fulfillment requirements demand storage solutions that can accommodate high SKU counts within constrained footprints. Rising labor costs for manual storage and retrieval operations accelerate automation investment. Growing emphasis on inventory accuracy and real-time visibility requires sophisticated software coordination. Regulatory requirements for traceability in pharmaceutical and food applications drive ASRS adoption.

Restraint:

High system complexity and specialized expertise requirements

High system complexity requiring specialized engineering expertise presents significant barriers to adoption and constrains the pool of qualified implementation partners. Integration complexity with existing warehouse management systems and ERP platforms extends project timelines and increases costs. Limited standardization across ASRS equipment vendors creates software integration challenges and reduces flexibility. Significant capital investment requirements limit adoption to larger operations with sufficient throughput volumes. System scalability limitations may require substantial reconfiguration as business requirements evolve.

Opportunity:

Integration of AI-driven optimization and predictive maintenance

Integration of AI-driven optimization engines presents significant growth opportunities for ASRS software providers seeking to differentiate their offerings. AI enables dynamic slotting optimization that continuously adjusts inventory placement based on demand patterns and retrieval frequency. Predictive maintenance capabilities leverage equipment sensor data to anticipate failures and schedule maintenance before unplanned downtime occurs. Digital twin integration enables virtual commissioning and operational simulation. Growing availability of cloud-based ASRS software expands addressable markets to smaller operations.

Threat:**Competition from integrated automation and WMS vendors**

Competition from integrated automation vendors and warehouse management system providers bundling ASRS control capabilities may limit adoption of standalone software solutions. Economic pressures may cause operators to delay system investments and extend existing platform lifecycles. Technology complexity may erode user confidence and slow adoption decisions. Consolidation across the warehouse technology sector may reduce vendor choice and increase pricing pressure. Evolving customer requirements may render existing software capabilities obsolete.

Covid-19 Impact:

The COVID-19 pandemic accelerated adoption of automated storage and retrieval systems as operators sought to maintain operations with reduced workforce availability. E-commerce volume surges during lockdown periods exposed capacity limitations and drove urgent automation investment. The post-pandemic period has witnessed sustained investment in ASRS technology as operators prioritize resilience and operational continuity. Growing focus on inventory accuracy and labor efficiency continues driving software adoption. Supply chain disruptions highlighted benefits of high-density storage with automated retrieval.

The warehouse control software segment is expected to be the largest during the forecast period

The warehouse control software segment is expected to account for the largest market share during the forecast period as WCS represents the critical real-time coordination layer between WMS and ASRS equipment. Growing ASRS adoption across diverse industries expands the installed base requiring control software. Advances in control algorithms enable higher throughput and more efficient equipment utilization. Integration with robotics control and material flow software creates comprehensive automation platforms. Established vendor presence and broad equipment compatibility support segment leadership.

The storage optimization segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the storage optimization segment is predicted to witness the

highest growth rate driven by increasing demand for dynamic slotting that maximizes throughput and minimizes retrieval times. AI-powered optimization engines continuously analyze demand patterns and adjust inventory placement to improve picking efficiency. Growing availability of real-time demand data enables more responsive optimization than traditional static slotting approaches. Storage optimization delivers measurable throughput improvements and operational cost reduction. Integration with order management enables optimized allocation of inventory to fulfill specific orders.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share owing to advanced warehouse automation adoption, strong presence of ASRS software vendors, and high labor costs driving technology investment. The United States hosts major automated storage system providers with established deployments across retail, e-commerce, and manufacturing sectors. High e-commerce penetration and land costs reinforce regional market leadership. Significant automation investment across distribution networks drives software adoption.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR driven by rapid e-commerce expansion, manufacturing growth, and increasing warehouse automation investment across major economies. China, Japan, and South Korea are expanding automated storage capacity with advanced software as a core component. Growing logistics infrastructure development and land scarcity in urban areas accelerate market growth. Expanding third-party logistics sectors across Southeast Asia create substantial new demand.

Key players in the market

Some of the key players in the Automated Storage & Retrieval Systems Software Market include Daifuku Co., Ltd., Dematic GmbH, SSI SCHAEFER Group, Swisslog Holding AG, KNAPP AG, Vanderlande Industries B.V., KION Group AG, Honeywell International Inc., Manhattan Associates, Inc., Blue Yonder Group, Inc., Mecalux, S.A., Oracle Corporation, SAP SE, AutoStore Holdings Ltd., and Exotec.

Key Developments:

In August 2026, AutoStore Holdings Ltd. introduced next-generation warehouse control

software featuring AI-powered storage optimization and predictive maintenance capabilities for its cube storage systems.

In April 2026, Dematic GmbH launched an enhanced ASRS control platform integrating digital twin simulation for virtual commissioning and real-time operational optimization across automated storage installations.

In November 2025, SSI SCHAEFER Group announced significant enhancements to its warehouse management software featuring improved orchestration of mixed ASRS and autonomous mobile robot operations.

In September 2024, Honeywell International Inc. launched an integrated software platform combining ASRS control with warehouse execution capabilities for comprehensive automated facility management.

Software Types Covered:

Warehouse Control Software

Warehouse Management Software

Inventory Management Software

Robotics Control Software

Material Flow Software

Other Software Types

System Types Covered:

Unit-Load ASRS

Mini-Load ASRS

Shuttle ASRS

Vertical Lift Modules

Carousels

Other System Types

Software Capabilities Covered:

Inventory Tracking

Storage Optimization

Task Management

Order Management

Equipment Coordination

Other Software Capabilities

Deployments Covered:

Cloud

On-Premises

End Users Covered:

Manufacturing

Retail & E-Commerce

Food & Beverage

Pharmaceuticals

Logistics & Warehousing

Other End Users

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market

estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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