

Asia Pacific AutoStore ASRS Market Size and Forecast (2021 - 2031)

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Abstracts

The Asia Pacific AutoStore Automated Storage and Retrieval System (ASRS) market is projected to grow significantly, reaching an estimated US\$ 207.8 million by 2031, up from US\$ 84.5 million in 2024. This growth reflects a compound annual growth rate (CAGR) of 13.9% from 2025 to 2031, indicating a robust demand for automated solutions in the region.

Executive Summary and Market Analysis

Leading countries in the adoption of AutoStore ASRS technology include China, Japan, South Korea, and India. These nations are actively promoting initiatives such as China's "Made in China 2025" and India's "Digital India," which aim to modernize manufacturing and logistics through smart technologies.

AutoStore's innovative modular, cube-based robotic system is gaining popularity among retail, e-commerce, and third-party logistics providers. This system offers scalable automation solutions that do not require significant changes to existing infrastructure. Its ability to increase storage density by four times and maintain an impressive uptime of 99.8% makes it particularly appealing for urban distribution centers, where space is often at a premium. A notable partnership was formed in May 2024 between AutoStore and CJ Logistics to implement its system at the Incheon Global Distribution Center in South Korea, which is expected to enhance the efficiency of cross-border e-commerce fulfillment.

The competitive landscape of the AutoStore ASRS market is intense, with key players such as Daifuku, Murata Machinery, and KION Group providing various ASRS solutions. However, AutoStore's robotic shuttle-based technology is emerging as the

fastest-growing segment due to its flexibility and rapid deployment capabilities. As labor costs rise and consumer expectations for faster delivery increase, businesses across the Asia Pacific region are prioritizing investments in automation, positioning AutoStore as a crucial player in the evolution of modern warehousing.

Strategic Insights

Market Segmentation Analysis

The Asia Pacific AutoStore ASRS market can be segmented by type and end-use industry. By type, the market includes categories such as Storage, Order Picking, Distribution, Kitting, Assembly, and Others. The Storage segment was the market leader in 2024. In terms of end-use industries, the market is divided into Automotive, Food and Beverage, Electronics and Semiconductors, E-commerce, Chemicals, Aerospace, Retail, Pharmaceutical, and Others, with the E-commerce segment also dominating in 2024.

Market Outlook

Emerging markets in Asia Pacific, as well as regions like Latin America, Africa, and Eastern Europe, are currently underdeveloped in terms of logistics infrastructure. However, there is a growing demand for safe and efficient storage and transportation solutions for perishable goods, including fresh produce, dairy, seafood, vaccines, and biologics. The expansion of pharmaceutical manufacturing and distribution, particularly in the wake of the COVID-19 pandemic, has underscored the necessity for automated cold storage solutions. AutoStore-type ASRS systems offer a compact, high-density solution that operates reliably in temperature-controlled environments, making them ideal for these sectors.

Governments in the region are providing financial incentives, tax benefits, and subsidies to encourage modernization and digital transformation, especially in critical sectors like healthcare and food. This supportive environment fosters investment opportunities for global ASRS providers. By offering tailored solutions, such as cold chain-compatible bin systems, vendors can capture a growing share of this market. These regions also present opportunities for long-term service agreements, maintenance contracts, and digital monitoring solutions. As consumer expectations rise, trade flows increase, and quality standards tighten, businesses in emerging markets are under pressure to adopt advanced storage technologies. Providers that can localize their solutions, adapt to regional challenges, and offer comprehensive support are well-positioned to benefit

from this shift.

Country Insights

The Asia Pacific AutoStore ASRS market is further segmented by country, including Australia, China, India, Japan, South Korea, Indonesia, Malaysia, Taiwan, Singapore, and the Rest of APAC. China held the largest market share in 2024, reflecting its rapid adoption of automation technologies to manage increasing order volumes and enhance supply chain efficiency.

For instance, in February 2022, Hai Robotics collaborated with sportswear brand Anta to launch a third automated warehouse project in South China. This facility integrates AutoStore's compact and scalable totes-to-person solution, designed to meet Anta's growing order demands by optimizing space utilization and accelerating order fulfillment. This partnership highlights the momentum towards advanced warehouse automation in China, positioning AutoStore as a key supplier in the footwear and apparel logistics sector.

Company Profiles

Key players in the Asia Pacific AutoStore ASRS market include KNAPP AG, Daifuku Co Ltd, Swisslog Holding AG, System Logistics SpA, Kardex Holding AG, Mecalux SA, Vanderlande Industries BV, Autocrib Inc, SSI SCHAEFER Group, Bastian Solutions LLC, Exotec SAS, Hai Robotics Co Ltd, Modula GROUP, H?nel GmbH & Co. KG, Weland Solutions AB, Beijing Geekplus Technology Co Ltd, Ferretto Group SpA, Craftsman Storage Systems, and Gonvarri Material Handling. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and deliver innovative solutions to their customers.

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