

Europe Automated Storage and Retrieval Systems (ASRS) Market Size and Forecast (2021-2035), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Type (Unit Load ASRS, Mini Load ASRS, Vertical Lift Module, Vertical Carousels, Horizontal Carousels, AutoStore, Other Types) and End-user Industry (Automotive, Food and Beverages, Electronic and Semiconductors, E-Commerce, Chemicals, Aerospace, Retail, Pharmaceuticals, Other End-users)

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Abstracts

The Europe automated storage and retrieval systems (ASRS) market is projected to grow significantly, reaching an estimated US\$ 2,280.38 million by 2035, up from US\$ 1,123.29 million in 2024. This growth reflects a compound annual growth rate (CAGR) of 6.9% from 2025 to 2035.

Executive Summary and Market Analysis

The increasing recognition of the advantages of ASRS, along with supportive government initiatives and the technology sector's commitment to integrating advanced technologies, is driving the demand for these systems across Europe. A notable development occurred in February 2025, when European Commission President Ursula von der Leyen announced the InvestAI initiative at the Artificial Intelligence (AI) Action Summit in Paris. This initiative aims to mobilize approximately US\$ 224.94 billion (200 billion euros) for AI technology investments, including US\$ 22.49 billion (20 billion

euros) specifically for AI gigafactories. This funding is intended to enhance and implement AI technologies across various sectors, including robotics, manufacturing, healthcare, biotechnology, mobility, climate, and virtual environments. The growing demand for AI-driven solutions presents opportunities for market players to innovate and develop AI-integrated ASRS solutions.

For instance, in October 2024, Lenovo introduced an innovative AAA solution that combines Automated Storage and Retrieval Systems (AS/RS), Autonomous Mobile Robots (AMR), and AI. This solution aims to facilitate digital transformation in warehouse operations, enhancing operational flexibility and resilience while improving warehouse throughput and inventory management. AI algorithms and machine vision technologies enable a warehouse equipped with these systems to achieve 30% higher throughput, 35% better space utilization, 30% faster order fulfillment, and 50% clearer visualization. Furthermore, AI plays a crucial role in data analysis, allowing for real-time optimization in robot scheduling, device management, exception handling, and navigation planning.

Strategic Insights

Market Segmentation Analysis

The Europe ASRS market can be segmented by type and end-user industry. The types of ASRS include unit load ASRS, mini load ASRS, vertical lift modules, vertical carousels, horizontal carousels, autostore systems, and others. In 2024, the vertical lift module segment dominated the market. In terms of end-user industries, the market is divided into automotive, food and beverages, electronics and semiconductors, e-commerce, chemicals, aerospace, retail, pharmaceuticals, and others, with the automotive sector holding the largest market share in 2024.

Market Outlook

ASRS is widely adopted across various industries for applications that require enhanced storage capacity, precise order picking and fulfillment, optimized stock levels, and streamlined processes to improve overall throughput. Industries such as automotive, aerospace, e-commerce, manufacturing, and logistics utilize ASRS to maintain efficient operations. The systems are particularly vital in e-commerce, logistics, retail, and warehousing, where they expedite order fulfillment and reduce the need for human labor in physically demanding tasks. The increasing demand for ASRS encourages manufacturers to innovate and develop products that meet the evolving needs of

customers.

Recent advancements in ASRS technology include ABB Ltd's launch of the ABB OmniVance FlexBuffer robot system in May 2024, designed to enhance warehouse operations at its instrumentation factory in Ossuccio, Italy. This fully automated system significantly improves logistics efficiency by 90%, eliminates manual handling, and reduces the time required for final package assembly by 30%. Additionally, Falcon Autotech unveiled its NEO product at CeMAT 2023 in Sydney, which utilizes advanced robotics, AI, and 3D movement capabilities to navigate storage spaces efficiently, reaching heights of up to 40 feet without the need for lifts or conveyor systems.

Country Insights

The Europe ASRS market encompasses several countries, including France, Germany, Italy, the UK, Spain, Sweden, the Netherlands, and others. Germany was the leading market in 2024. In April 2025, SSI SCHAEFER Group partnered with BD Rowa to deliver an advanced automation solution for the healthcare sector. This collaboration integrates BD Rowa's Vmax dispensing robot into SSI SCHAEFER's scalable order buffer systems, automating warehouse management and the picking of pharmaceutical products. This innovation enhances throughput and order fulfillment efficiency in the healthcare industry, demonstrating the growing trend of automation in various sectors.

Company Profiles

Key players in the Europe ASRS market include Autocrib Inc, Bastian Solutions LLC, Daifuku Co Ltd, Kardex Holding AG, KNAPP AG, Mecalux SA, SSI SCHAEFER Group, Swisslog Holding AG, System Logistics SpA, and Vanderlande Industries BV. These companies are pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase market share. The ongoing advancements in ASRS technology and the rising demand for automation solutions are expected to drive significant growth in the market.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:
- 3.3 Assumptions and Limitations

4. EUROPE AUTOMATED STORAGE AND RETRIEVAL SYSTEMS (ASRS) MARKET LANDSCAPE

- 4.1 Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
- 4.4 List of Vendors in the Value Chain

5. EUROPE AUTOMATED STORAGE AND RETRIEVAL SYSTEMS (ASRS) MARKET - KEY MARKET DYNAMICS

- 5.1 Europe Automated Storage and Retrieval Systems (ASRS) Market - Key Market Dynamics
- 5.2 Market Drivers
 - 5.2.1 Growing Need for Optimized and Space-Efficient Storage Systems
 - 5.2.2 Rising Manufacturing Volume Across Industries

- 5.2.3 Growth of E-Commerce Worldwide
- 5.3 Market Restraints
 - 5.3.1 High Initial Investment
- 5.4 Market Opportunities
 - 5.4.1 Integration of AI Technology in ASRS
- 5.5 Future Trends
 - 5.5.1 Integration of Robotics in Warehouse Automation
- 5.6 Impact of Drivers and Restraints:

6. EUROPE AUTOMATED STORAGE AND RETRIEVAL SYSTEMS (ASRS) MARKET ANALYSIS

- 6.1 Europe Automated Storage and Retrieval Systems (ASRS) Market Volume (Units), 2021-2035
- 6.2 Europe Automated Storage and Retrieval Systems (ASRS) Market Volume Forecast and Analysis (Units)
- 6.3 Europe Automated Storage and Retrieval Systems (ASRS) Market Revenue (US\$ Million), 2024-2035
- 6.4 Europe Automated Storage and Retrieval Systems (ASRS) Market Forecast and Analysis

7. EUROPE AUTOMATED STORAGE AND RETRIEVAL SYSTEMS (ASRS) MARKET VOLUME AND REVENUE ANALYSIS - BY TYPE

- 7.1 Unit Load ASRS
 - 7.1.1 Overview
 - 7.1.2 Unit Load ASRS: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)
 - 7.1.3 Unit Load ASRS: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)
- 7.2 Mini Load ASRS
 - 7.2.1 Overview
 - 7.2.2 Mini Load ASRS: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)
 - 7.2.3 Mini Load ASRS: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)
- 7.3 Vertical Lift Module
 - 7.3.1 Overview
 - 7.3.2 Vertical Lift Module: Europe Automated Storage and Retrieval Systems (ASRS)

Market - Volume and Forecast, 2021-2035 (Units)

7.3.3 Vertical Lift Module: Europe Automated Storage and Retrieval Systems (ASRS)

Market - Revenue and Forecast, 2021-2035 (US\$ Million)

7.4 Vertical Carousels

7.4.1 Overview

7.4.2 Vertical Carousels: Europe Automated Storage and Retrieval Systems (ASRS)

Market - Volume and Forecast, 2021-2035 (Units)

7.4.3 Vertical Carousels: Europe Automated Storage and Retrieval Systems (ASRS)

Market - Revenue and Forecast, 2021-2035 (US\$ Million)

7.5 Horizontal Carousels

7.5.1 Overview

7.5.2 Horizontal Carousels: Europe Automated Storage and Retrieval Systems (ASRS)

Market - Volume and Forecast, 2021-2035 (Units)

7.5.3 Horizontal Carousels: Europe Automated Storage and Retrieval Systems (ASRS)

Market - Revenue and Forecast, 2021-2035 (US\$ Million)

7.6 AutoStore

7.6.1 Overview

7.6.2 AutoStore: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)

7.6.3 AutoStore: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

7.7 Others

7.7.1 Overview

7.7.2 Others: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)

7.7.3 Others: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

8. EUROPE AUTOMATED STORAGE AND RETRIEVAL SYSTEMS (ASRS) MARKET REVENUE ANALYSIS - BY END-USER INDUSTRY

8.1 Automotive

8.1.1 Overview

8.1.2 Automotive: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

8.2 Food and Beverages

8.2.1 Overview

8.2.2 Food and Beverages: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

8.3 Electronic and Semiconductors

8.3.1 Overview

8.3.2 Electronic and Semiconductors: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

8.4 E-Commerce

8.4.1 Overview

8.4.2 E-Commerce: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

8.5 Chemicals

8.5.1 Overview

8.5.2 Chemicals: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

8.6 Aerospace

8.6.1 Overview

8.6.2 Aerospace: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

8.7 Retail

8.7.1 Overview

8.7.2 Retail: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

8.8 Pharmaceuticals

8.8.1 Overview

8.8.2 Pharmaceuticals: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

8.9 Others

8.9.1 Overview

8.9.2 Others: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

9. EUROPE AUTOMATED STORAGE AND RETRIEVAL SYSTEMS (ASRS) MARKET - COUNTRY ANALYSIS

9.1 Europe

9.1.1 Europe Automated Storage and Retrieval Systems (ASRS) Market Revenue and Forecast and Analysis - by Country

9.1.1.1 Europe Automated Storage and Retrieval Systems (ASRS) Market Volume and Forecast and Analysis - by Country

9.1.1.2 Europe Automated Storage and Retrieval Systems (ASRS) Market Revenue and Forecast and Analysis - by Country

9.1.1.3 France: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

9.1.1.3.1 France: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by Type

9.1.1.3.2 France: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by End-user Industry

9.1.1.4 Germany: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

9.1.1.4.1 Germany: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by Type

9.1.1.4.2 Germany: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by End-user Industry

9.1.1.5 Italy: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

9.1.1.5.1 Italy: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by Type

9.1.1.5.2 Italy: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by End-user Industry

9.1.1.6 United Kingdom: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

9.1.1.6.1 United Kingdom: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by Type

9.1.1.6.2 United Kingdom: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by End-user Industry

9.1.1.7 Spain: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

9.1.1.7.1 Spain: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by Type

9.1.1.7.2 Spain: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by End-user Industry

9.1.1.8 Sweden: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

9.1.1.8.1 Sweden: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by Type

9.1.1.8.2 Sweden: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by End-user Industry

9.1.1.9 Netherlands: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

9.1.1.9.1 Netherlands: Europe Automated Storage and Retrieval Systems (ASRS)

Market Share - by Type

9.1.1.9.2 Netherlands: Europe Automated Storage and Retrieval Systems (ASRS)

Market Share - by End-user Industry

9.1.1.10 Rest of Europe: Europe Automated Storage and Retrieval Systems (ASRS)

Market - Revenue and Forecast, 2021-2035 (US\$ Million)

9.1.1.10.1 Rest of Europe: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by Type

9.1.1.10.2 Rest of Europe: Europe Automated Storage and Retrieval Systems (ASRS) Market Share - by End-user Industry

10. COMPETITIVE LANDSCAPE

10.1 Heat Map Analysis by Key Players

10.2 Company Market Share Analysis, 2024

11. INDUSTRY LANDSCAPE

11.1 Overview

11.2 Market Initiative

11.3 Product Development

11.4 Mergers & Acquisitions

12. COMPANY PROFILES

12.1 SSI SCHAEFER Group

12.1.1 Key Facts

12.1.2 Business Description

12.1.3 Products and Services

12.1.4 Financial Overview

12.1.5 SWOT Analysis

12.1.6 Key Developments

12.2 Swisslog Holding AG

12.2.1 Key Facts

12.2.2 Business Description

12.2.3 Products and Services

12.2.4 Financial Overview

12.2.5 SWOT Analysis

12.2.6 Key Developments

12.3 System Logistics SpA

- 12.3.1 Key Facts
- 12.3.2 Business Description
- 12.3.3 Products and Services
- 12.3.4 Financial Overview
- 12.3.5 SWOT Analysis
- 12.3.6 Key Developments
- 12.4 Bastian Solutions LLC
 - 12.4.1 Key Facts
 - 12.4.2 Business Description
 - 12.4.3 Products and Services
 - 12.4.4 Financial Overview
 - 12.4.5 SWOT Analysis
 - 12.4.6 Key Developments
- 12.5 Daifuku Co Ltd
 - 12.5.1 Key Facts
 - 12.5.2 Business Description
 - 12.5.3 Products and Services
 - 12.5.4 Financial Overview
 - 12.5.5 SWOT Analysis
 - 12.5.6 Key Developments
- 12.6 Kardex Holding AG
 - 12.6.1 Key Facts
 - 12.6.2 Business Description
 - 12.6.3 Products and Services
 - 12.6.4 Financial Overview
 - 12.6.5 SWOT Analysis
 - 12.6.6 Key Developments
- 12.7 KNAPP AG
 - 12.7.1 Key Facts
 - 12.7.2 Business Description
 - 12.7.3 Products and Services
 - 12.7.4 Financial Overview
 - 12.7.5 SWOT Analysis
 - 12.7.6 Key Developments
- 12.8 Mecalux SA
 - 12.8.1 Key Facts
 - 12.8.2 Business Description
 - 12.8.3 Products and Services
 - 12.8.4 Financial Overview

- 12.8.5 SWOT Analysis
- 12.8.6 Key Developments
- 12.9 Vanderlande Industries BV
 - 12.9.1 Key Facts
 - 12.9.2 Business Description
 - 12.9.3 Products and Services
 - 12.9.4 Financial Overview
 - 12.9.5 SWOT Analysis
 - 12.9.6 Key Developments
- 12.10 Autocrib Inc
 - 12.10.1 Key Facts
 - 12.10.2 Business Description
 - 12.10.3 Products and Services
 - 12.10.4 Financial Overview
 - 12.10.5 SWOT Analysis
 - 12.10.6 Key Developments

13. APPENDIX

- 13.1 About the Insight Partners
- 13.2 Word Index

List Of Tables

LIST OF TABLES

- Table 1. Europe Automated Storage and Retrieval Systems (ASRS) Market Segmentation
- Table 2. List of Vendors
- Table 3. Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)
- Table 4. Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)
- Table 5. Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by Type
- Table 6. Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by Type
- Table 7. Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by End-user Industry
- Table 8. Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by End-user Industry
- Table 9. Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by Country
- Table 10. Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by Country
- Table 11. France: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by Type
- Table 12. France: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by Type
- Table 13. France: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by End-user Industry
- Table 14. Germany: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by Type
- Table 15. Germany: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by Type
- Table 16. Germany: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by
- Table 17. Germany: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by End-user Industry
- Table 18. Italy: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by Type

Table 19. Italy: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by Type

Table 20. Italy: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by

Table 21. Italy: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by End-user Industry

Table 22. United Kingdom: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by Type

Table 23. United Kingdom: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by Type

Table 24. United Kingdom: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by

Table 25. United Kingdom: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by End-user Industry

Table 26. Spain: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by Type

Table 27. Spain: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by Type

Table 28. Spain: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by

Table 29. Spain: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by End-user Industry

Table 30. Sweden: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by Type

Table 31. Sweden: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by Type

Table 32. Sweden: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by

Table 33. Sweden: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by End-user Industry

Table 34. Netherlands: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by Type

Table 35. Netherlands: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by Type

Table 36. Netherlands: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by End-user Industry

Table 37. Rest of Europe: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units) - by Type

Table 38. Rest of Europe: Europe Automated Storage and Retrieval Systems (ASRS)

Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by Type

Table 39. Rest of Europe: Europe Automated Storage and Retrieval Systems (ASRS)

Market - Revenue and Forecast, 2021-2035 (US\$ Million) - by End-user Industry

Table 40. Heat Map Analysis by Key Players

Table 41. List of Abbreviation

List Of Figures

LIST OF FIGURES

- Figure 1. Europe Automated Storage and Retrieval Systems (ASRS) Market Segmentation - Country
- Figure 2. PEST Analysis
- Figure 3. Impact Analysis of Drivers and Restraints
- Figure 4. Europe Automated Storage and Retrieval Systems (ASRS) Market Volume (Units), 2021-2035
- Figure 5. Europe Automated Storage and Retrieval Systems (ASRS) Market Revenue (US\$ Million), 2024-2035
- Figure 6. Europe Automated Storage and Retrieval Systems (ASRS) Market Share (%) - Type, 2024 and 2035
- Figure 7. Unit Load ASRS: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)
- Figure 8. Unit Load ASRS: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)
- Figure 9. Mini Load ASRS: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)
- Figure 10. Mini Load ASRS: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)
- Figure 11. Vertical Lift Module: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)
- Figure 12. Vertical Lift Module: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)
- Figure 13. Vertical Carousels: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)
- Figure 14. Vertical Carousels: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)
- Figure 15. Horizontal Carousels: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)
- Figure 16. Horizontal Carousels: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)
- Figure 17. AutoStore: Europe Automated Storage and Retrieval Systems (ASRS) Market - Volume and Forecast, 2021-2035 (Units)
- Figure 18. AutoStore: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)
- Figure 19. Others: Europe Automated Storage and Retrieval Systems (ASRS) Market -

Volume and Forecast, 2021-2035 (Units)

Figure 20. Others: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 21. Europe Automated Storage and Retrieval Systems (ASRS) Market Share (%) - End-user Industry, 2024 and 2035

Figure 22. Automotive: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 23. Food and Beverages: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 24. Electronic and Semiconductors: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 25. E-Commerce: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 26. Chemicals: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 27. Aerospace: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 28. Retail: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 29. Pharmaceuticals: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 30. Others: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 31. Europe Automated Storage and Retrieval Systems (ASRS) Market Breakdown by Key Countries, 2024 and 2035 (%)

Figure 32. France: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 33. Germany: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 34. Italy: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 35. United Kingdom: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 36. Spain: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 37. Sweden: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 38. Netherlands: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 39. Rest of Europe: Europe Automated Storage and Retrieval Systems (ASRS) Market - Revenue and Forecast, 2021-2035 (US\$ Million)

Figure 40. Company Market Share Analysis, 2024

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Product name: Europe Automated Storage and Retrieval Systems (ASRS) Market Size and Forecast (2021-2035), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Type (Unit Load ASRS, Mini Load ASRS, Vertical Lift Module, Vertical Carousels, Horizontal Carousels, AutoStore, Other Types) and End-user Industry (Automotive, Food and Beverages, Electronic and Semiconductors, E-Commerce, Chemicals, Aerospace, Retail, Pharmaceuticals, Other End-users)

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