

Europe AutoStore ASRS Market Size and Forecast (2021 - 2031)

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Abstracts

The Europe AutoStore Automated Storage and Retrieval Systems (ASRS) market is poised for significant growth, projected to reach approximately US\$ 243.8 million by 2031, up from US\$ 125.4 million in 2024. This growth trajectory indicates a compound annual growth rate (CAGR) of 10.3% from 2025 to 2031, reflecting the increasing demand for efficient warehouse automation solutions across the continent.

Executive Summary and Market Analysis

The European AutoStore ASRS market is characterized by rapid innovation and operational flexibility, largely driven by the expansion of e-commerce, labor shortages, and the pressing need for space-efficient automation solutions. A notable development occurred in January 2023 when DHL Supply Chain, in partnership with systems integrator Element Logic, implemented a robotic picking system at its 6,000-square-meter facility in Staufenberg, Germany. This AutoStore ASRS, designed for the fashion retailer Peek and Cloppenburg in D?sseldorf, manages over 3.5 million items stored in 196,000 bins within a 16-level aluminum grid. This system has significantly improved order accuracy and fulfillment speed across Germany, Austria, Poland, and the Netherlands.

In another instance, in October 2025, Kardex successfully delivered an AutoStore system to Balluff Inc. within a remarkable six-month timeframe, setting a new standard for rapid deployment in the industry. This project required no major infrastructure changes or operational downtime, demonstrating AutoStore's adaptability to modern industrial settings. The integration with Balluff's SAP system resulted in a 177% increase in throughput while optimizing storage density and workflow efficiency. Innovative design features, such as cross-building layouts and seismic bracers,

facilitated quicker installations and maximized space utilization.

Germany is at the forefront of adopting AutoStore systems, thanks to its robust industrial base and ongoing logistics modernization efforts. Additionally, there is a growing investment in smart warehousing solutions across the UK, France, and the Netherlands, indicating a broader trend of warehouse automation in Europe.

Strategic Insights

Market Segmentation Analysis

The Europe 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, with the Storage segment leading the market 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 E-commerce being the dominant segment in 2024.

The increasing labor turnover, training costs, and health and safety risks associated with manual warehouse operations are driving the shift towards automation, particularly the adoption of ASRS solutions. These systems, including AutoStore, enable warehouses to function with significantly fewer human workers, as robots or shuttles manage storage and retrieval tasks, often operating around the clock with minimal supervision. This automation leads to reduced picking errors, enhanced inventory accuracy, and optimized space utilization, all contributing to lower operational costs over time.

Moreover, ASRS systems mitigate reliance on temporary labor during peak seasons, providing businesses with stability against seasonal labor fluctuations. In sectors such as retail, third-party logistics (3PL), and manufacturing, where speed and efficiency in fulfillment are critical, automating repetitive tasks through ASRS has become a strategic imperative.

The adoption of ASRS also enhances workplace safety by reducing the need for forklifts and manual retrieval in high-shelving environments. As the demand for efficiency increases, the implementation of labor-saving technologies like ASRS is on the rise.

Country Insights

The Europe AutoStore ASRS market is further segmented by country, including France, Germany, Italy, the United Kingdom, Spain, Sweden, the Netherlands, and the Rest of Europe. Germany holds the largest market share as of 2024, driven by its strong logistics and automation landscape, supported by advanced manufacturing capabilities. The demand for AutoStore ASRS systems is steadily increasing as companies seek to enhance operational efficiency, reduce labor dependency, and navigate the complexities of modern supply chains.

In May 2025, Germany Trade and Invest reported that the new conservative-Social Democratic government, led by Chancellor Friedrich Merz, announced plans to invest hundreds of millions of euros into economic stimulus and infrastructure upgrades. These investments are expected to accelerate modernization efforts across various sectors, including logistics and warehousing. Improved infrastructure and a supportive policy environment will likely enhance the deployment of advanced automation systems like AutoStore ASRS, particularly in automotive, retail, and industrial manufacturing sectors.

With a continued emphasis on innovation, efficiency, and digital transformation, Germany is well-positioned to lead the adoption of intelligent warehouse automation. Strategic investments and supportive policies will further solidify the country's role as a hub for smart logistics and high-performance storage solutions.

Company Profiles

Key players in the Europe 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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