

South & Central America AutoStore ASRS Market Size and Forecast (2021 - 2031)

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Abstracts

The South and Central America AutoStore Automated Storage and Retrieval System (ASRS) market is projected to grow significantly, reaching an estimated US\$ 66.3 million by 2031, up from US\$ 28.7 million in 2024. This growth reflects a compound annual growth rate (CAGR) of 12.9% from 2025 to 2031, driven by various factors including the expansion of retail sectors, manufacturing bases, and investments in advanced technologies across the region.

Countries such as Brazil, Argentina, Chile, and Peru are at the forefront of adopting AutoStore systems. The modular, cube-based design of AutoStore is particularly appealing to businesses aiming to optimize warehouse space, enhance accuracy, and reduce reliance on manual labor. Industries such as retail, e-commerce, pharmaceuticals, and food and beverage are increasingly implementing AutoStore ASRS to facilitate rapid and error-free order fulfillment. The system's scalability and quick deployment capabilities—without necessitating major infrastructure changes—make it an attractive option for modernizing warehouses, especially in light of rising labor costs and the complexities of supply chains.

A notable example of successful implementation is Dafiti, a leading fashion e-commerce platform, which has installed the largest AutoStore system in Latin America. This deployment has resulted in a remarkable fivefold increase in throughput, setting a new standard for automated fulfillment in the region.

Technological advancements, particularly in artificial intelligence (AI), robotics, and the Internet of Things (IoT), are further enhancing the operational intelligence of AutoStore systems. These technologies enable real-time inventory tracking and dynamic workflow optimization, which are crucial for meeting the demands of modern logistics. Brazil's

robust industrial base, coupled with government support for innovation, is accelerating the adoption of these systems. Additionally, the modernization of logistics in Argentina, Chile, and Peru is contributing to the growing interest in smart warehousing solutions, which are essential for improving supply chain resilience and meeting consumer expectations for faster delivery.

Despite facing challenges such as high initial capital investment and the complexity of system integration, the South and Central America AutoStore ASRS market is well-positioned for sustained growth. The ongoing trends of globalization and digital transformation are making AutoStore a vital component in the evolution of responsive warehouse operations throughout the region.

Market Segmentation Analysis

The South and Central America 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, Pharmaceuticals, and Others, with the Automotive sector also dominating in 2024.

Market Outlook

Emerging markets in Asia Pacific, Latin America, Africa, and Eastern Europe are currently underdeveloped in terms of logistics infrastructure but are witnessing a rising demand for safe and efficient storage and transportation solutions, particularly for perishable goods like fresh produce, dairy, seafood, vaccines, and biologics. The COVID-19 pandemic has underscored the importance of automated cold storage solutions, and 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 such as healthcare and food. This supportive environment is conducive to investment from global ASRS providers. By offering tailored solutions, such as cold chain-compatible bin systems, vendors can capture a growing share of the market. The demand for long-term service agreements, maintenance contracts, and digital monitoring solutions is also on

the rise. As consumer expectations increase, trade flows expand, 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 likely to thrive in this evolving landscape.

Country Insights

The South and Central America AutoStore ASRS market is further segmented by country, with Brazil, Argentina, and the Rest of South and Central America being the primary categories. Brazil is expected to hold the largest market share in 2024, driven by the growth of e-commerce and contract logistics. The recent opening of DP World's first multi-customer warehouse in Brazil, located in Cajamar near S?o Paulo, highlights the increasing adoption of AutoStore automation to enhance efficiency and scalability in supply chains. This facility is designed to provide flexible storage and fulfillment services, catering to the growing demand from various industries, including retail, manufacturing, and consumer goods.

Brazil's commitment to enhancing its logistics capabilities through AutoStore warehouse automation underscores its ambition to become a leading logistics hub in South America.

Company Profiles

Key players in the South and Central America 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 pursuing 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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