



ANMD-MRS3-028 · Industrial Automation

Automated Guided Vehicles

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Automated guided vehicles (AGVs) move materials autonomously through plants and warehouses, turning manual transport into continuous, safe, optimised intralogistics. This decision-grade study sizes the global market three ways — value, units and installed base (thousand units) — across vehicle type, navigation and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond productivity, automated guided vehicles deliver measurable energy-efficient material flow, labour productivity and safety, while optimised routing and lower idle time strengthen the resource-efficiency story.

Mapped Sustainable Development Goals:

SDG 8 Decent Work	SDG 9 Industry & Innovation	SDG 12 Responsible Consumption
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Measurable sustainability outcomes assessed:

- Energy-efficient, optimised material flow
- Labour productivity and continuous operations
- Improved workplace safety
- Energy use, battery circularity and workforce transition as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	3 SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Asia Pacific is the volume leader (China, Japan, South Korea) on manufacturing and e-commerce; Europe is the technology leader (Germany, Netherlands, France) on intralogistics; North America accelerates on e-commerce and warehousing; other regions assessed on their own merits.



MARKET OVERVIEW

From early adoption to mainstream scale — where autonomous vehicles run continuous, optimised material flow.

The automated guided vehicles market is moving from early adoption to mainstream commercial scale. Demand is driven by Industry 4.0 adoption converging with labour, quality and productivity pressure, supported by maturing momentum across Asia Pacific, Europe and North America. The market is read three ways — value, units and installed base (thousand units) — and forecast under four scenarios, each region reported separately.

- Asia Pacific is the volume leader — China, Japan and South Korea, on manufacturing and e-commerce
- Europe is the technology leader — Germany, Netherlands and France, on intralogistics and automotive
- North America accelerates on e-commerce and warehousing
- Productivity and quality are the differentiator — throughput and quality gains plus data-driven optimisation

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Asia Pacific	Volume leader	China, Japan, South Korea — manufacturing, e-commerce
Europe	Technology leader	Germany, Netherlands, France — intralogistics, automotive
North America	Accelerating	United States, Canada, Mexico — e-commerce, warehousing
Middle East	High-growth	UAE, Saudi Arabia — logistics hubs
Latin America	Emerging	Brazil, Mexico — distribution, manufacturing
Africa	Emerging	South Africa — distribution, warehousing

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • Automation + labour-productivity convergence • Resource & energy-efficiency, productivity gains • Policy support (Industry 4.0, automation & reshoring incentives) • Manufacturer cost, labour & throughput economics • AI, sensor, connectivity & control technology gains 	<ul style="list-style-type: none"> • Capital cost & integration complexity • Interoperability & legacy-system hurdles • Skills, change-management & workforce gaps • Component, chip & supply-chain cost inflation • Cybersecurity, data-governance & adoption barriers



SEGMENTATION SNAPSHOT

By Vehicle Type	Tugger / tow · unit-load · forklift · assembly-line AGV · autonomous mobile robot
By Navigation	Wire / magnetic · laser / QR · SLAM / vision
By Application	Warehousing & distribution · manufacturing & assembly · automotive & e-commerce
By End User	Manufacturers · system integrators · OEMs · contract producers · plant operators
By Business Model	Direct sale · system integrator · as-a-service · subscription / licensing
By Scale	Pilot fleet · facility · multi-site

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Automated Guided Vehicles
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
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Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape



Part V — Company, Competition, Patent and Project Intelligence

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- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
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- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

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- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans specialist AGV vendors, established automation majors, and system integrators. Deal activity — M&A, technology partnerships and platform consolidation — signals a market consolidating around scalable, integrated automation.

Representative players profiled in the full report:

Daifuku Co., Ltd. · Dematic (KION GROUP AG) · Toyota Industries Corporation · Jungheinrich AG · JBT Corporation · and 20+ further profiled players across AGV OEMs, intralogistics majors and system integrators.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.



KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global automated guided vehicles market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do productivity and quality gains change value versus manual production?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the category align with the SDGs and resource-efficiency goals?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › Triangulated sizing — every market read three ways so value, volume and area views reconcile rather than conflict.
- › Region-honest forecasting — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › Integrated evidence base — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › No-fabrication discipline — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › Anti-greenwashing rigour — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › Decision-first structure — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear Go / No-Go / Conditional-Go investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, equipment manufacturers and OEMs, system integrators, contract producers and plant operators, automation and operations leaders, policymakers, and corporate strategy and ESG teams.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.