

2023-2024 Edition

# **Global Mobile Robot (AGV/AMR) Industry Development Report**

■ *Presented by China Mobile Robot Alliance*

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# Description

- **Data source:** The report is compiled on the most recent statistics provided by 300 plus market players in mobile robotics from home and abroad. The data is coupled with an insightful and comprehensive analysis of the status-quo of mobile robotics application at top-tier end users from various market segments.
- **Survey Methods:** A combined approach was adopted in carrying out the survey, including questionnaires, verification lists, field visits and interviews.
- **Content summary:** The full report provides a multi-faceted view on the current global mobile robotics landscape with nine chapters that run over 60 pages, casting light on revenues, sales volume, popular products and market segments, industry crossection, top players world wide, future trends, etc.



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**Global Market Volume in 2023**

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**Global Competitive Landscape  
in 2023**

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**Global Market Forecast 2023**

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**About CMRA**

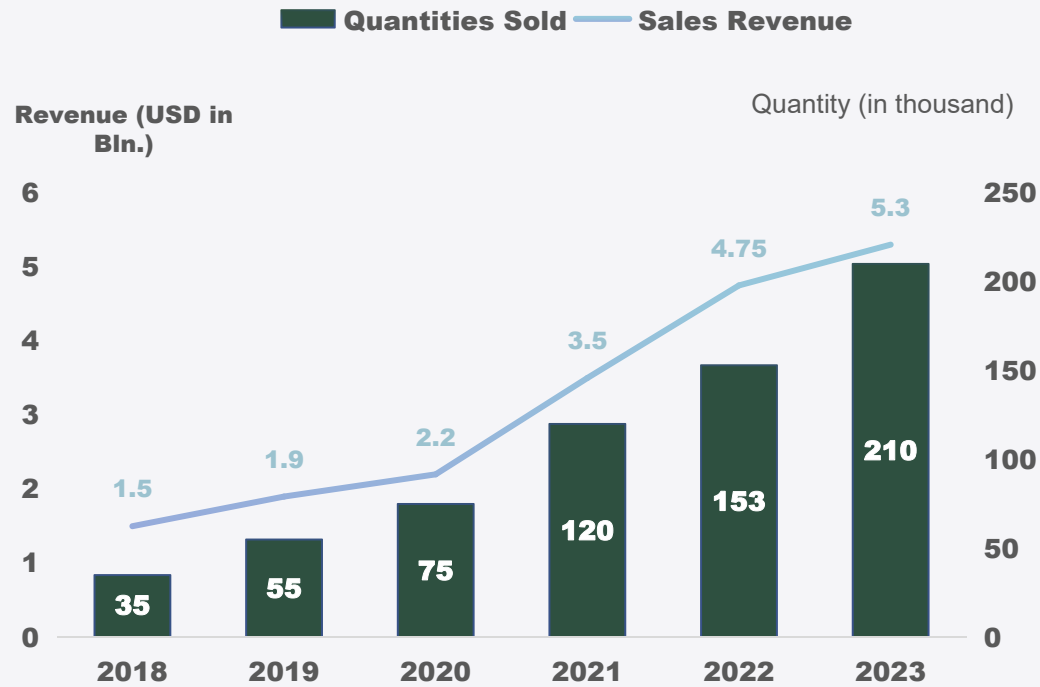
**01**

# **Global Market Volume in 2023**

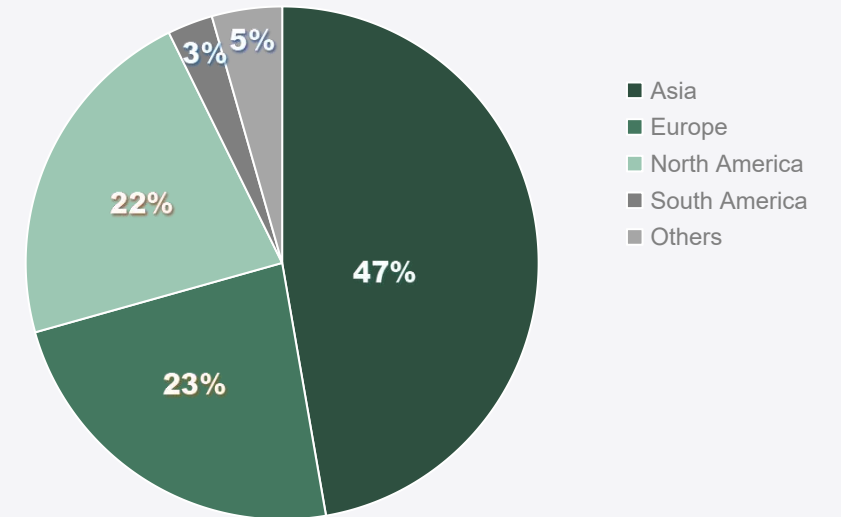
Sales revenue reached USD 5.3 bln. with quantities of unit sold surged to 210,000.

Asia held the largest market share by region, accounting for 47.27% of the global market size.

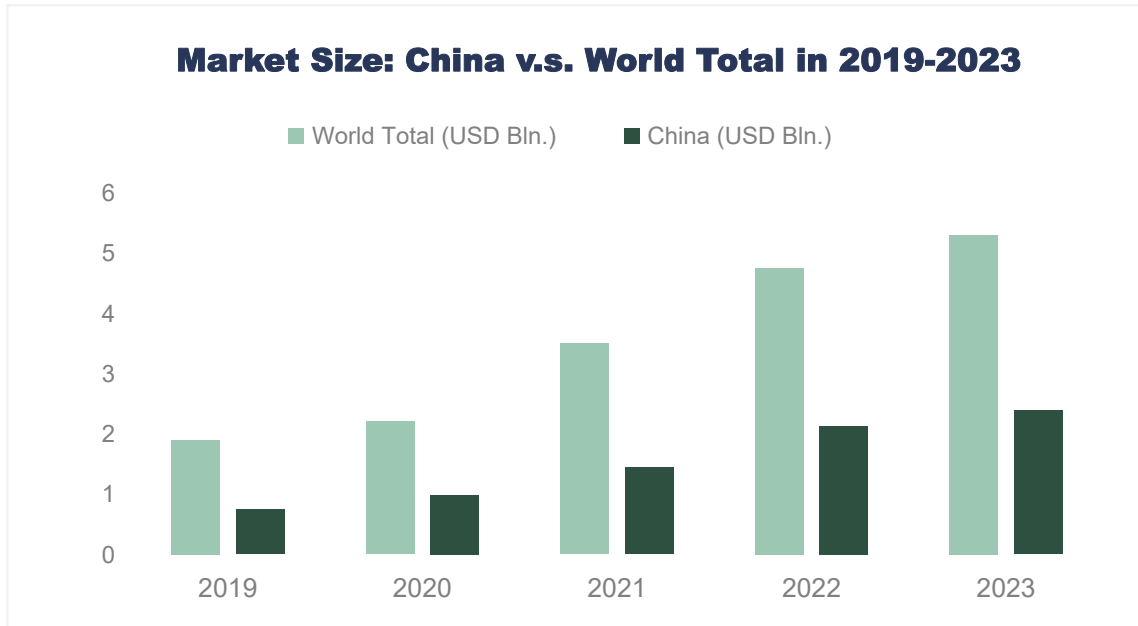
**Sales Revenues and Quantities for Year 2018-2023**



**Global Market Share by Region in 2023**



# Worldwide Market Growth in 2023

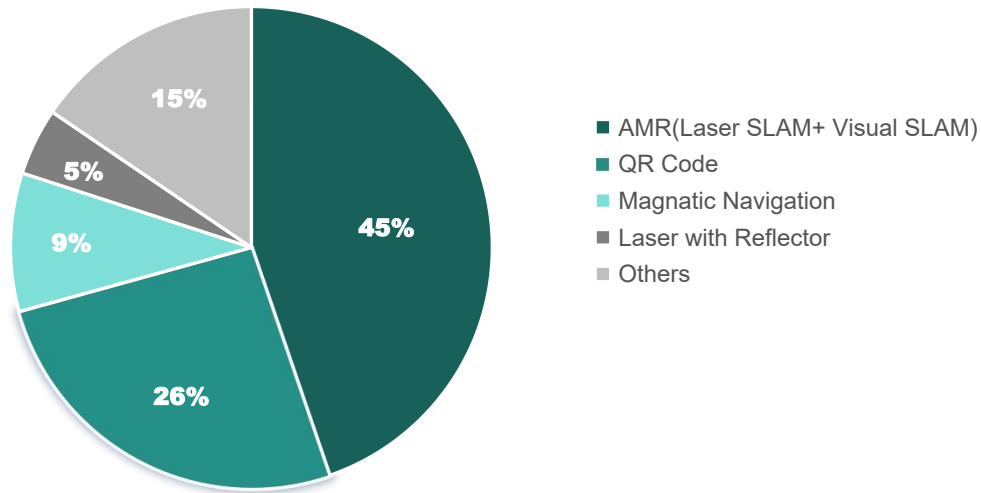


- The past year saw varying growth in all major markets. Asia outperformed the rest, thanks to the burgeoning markets in China.
- China boasted the most extensive application of AGV/AMRs snapping up a massive 45% share by sales revenues.

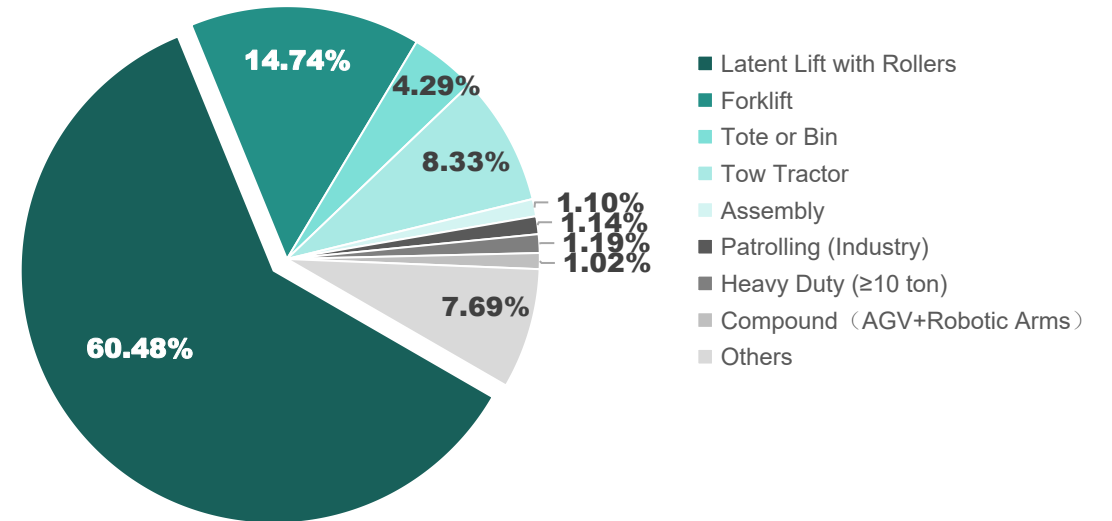
# 2023 Global AGV/AMR Market Share by Products

- According to CMRA statistics, AMRs have dominated the market when classified by mode of navigation, constituting 44.76% of units sold.
- Among different form factors, latent lift AGV/AMV running on rollers are the most popular products, accounting for 60% of units sold.

**Market Share of AGV/AMR Products (by Navigation Mode)**



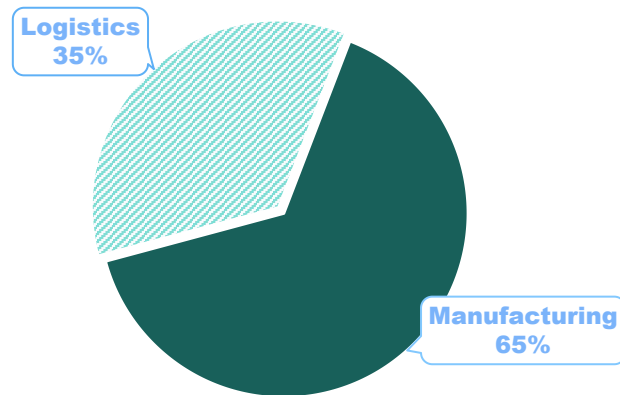
**Market Share of AGV/AMR products (by Form Factors)**



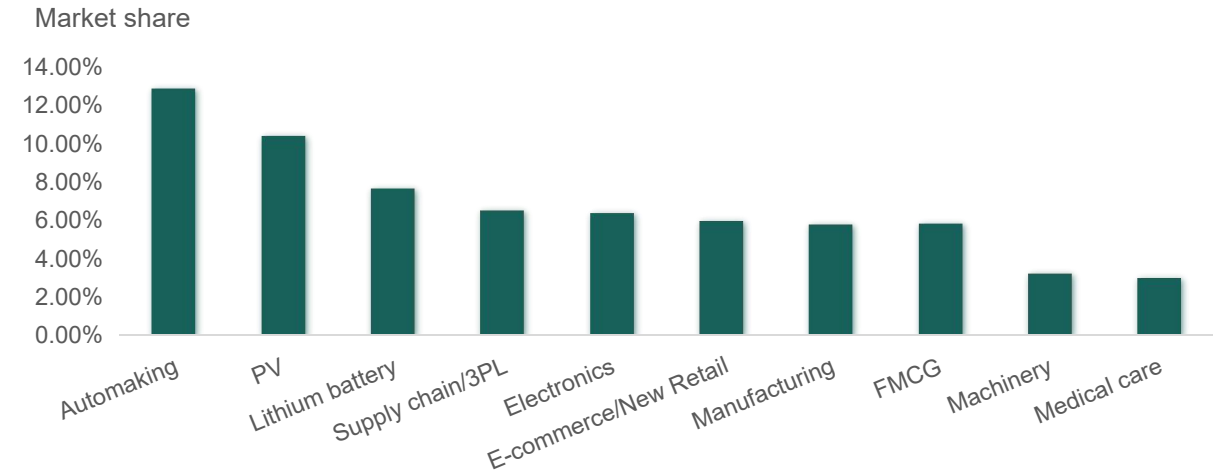
# Global AGV/AMR Market Segments 2023

- Classified by the industry sector of end users, 65% of mobile robots served manufacturing in 2023, with the remaining 35% working in logistics.
- Further scrutiny from market segments revealed that car making, photovoltaics, lithium battery, supply chain/3P logistics ranked the top destination fields in 2023.

**Mobile Robots Distribution by Industry Sectors**



**Global AGV/AMR Market Segments**

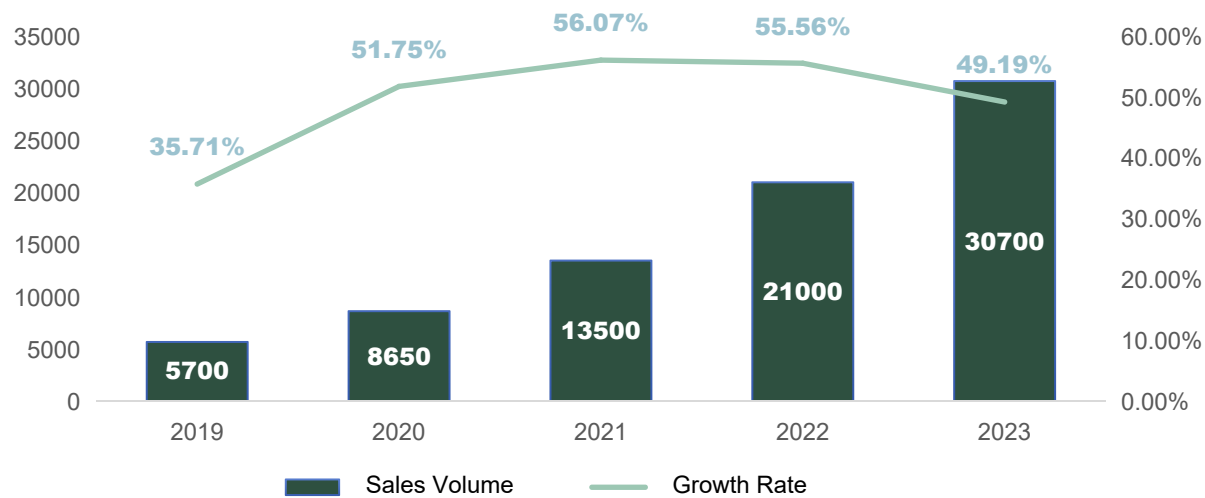




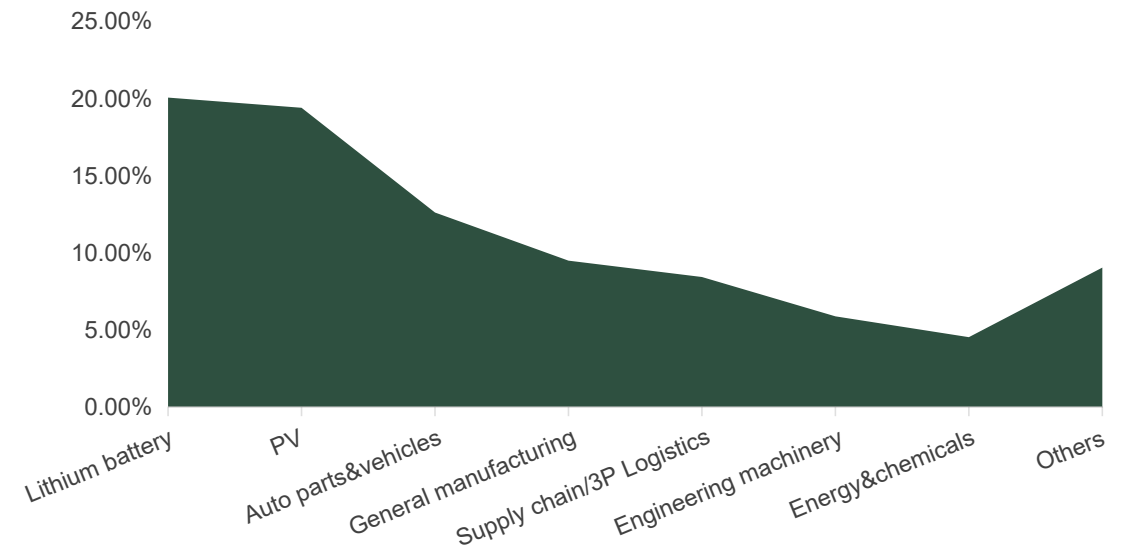
# Forked AGV/AMR sales exceeded 30,000 in 2023

➤ Sales volume of global forklift robots shot up by 49.19% y.o.y to a record level of 30700 units in 2023.

**Global Forked AGV/AMR Sales Volume and Growth Rate from 2019 to 2023**



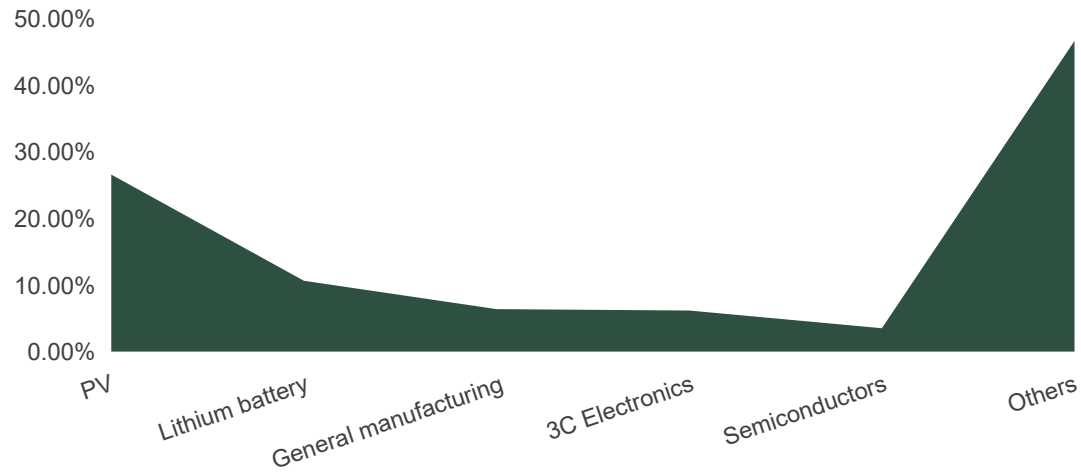
**Forklifts' Industry Landscape in 2023**



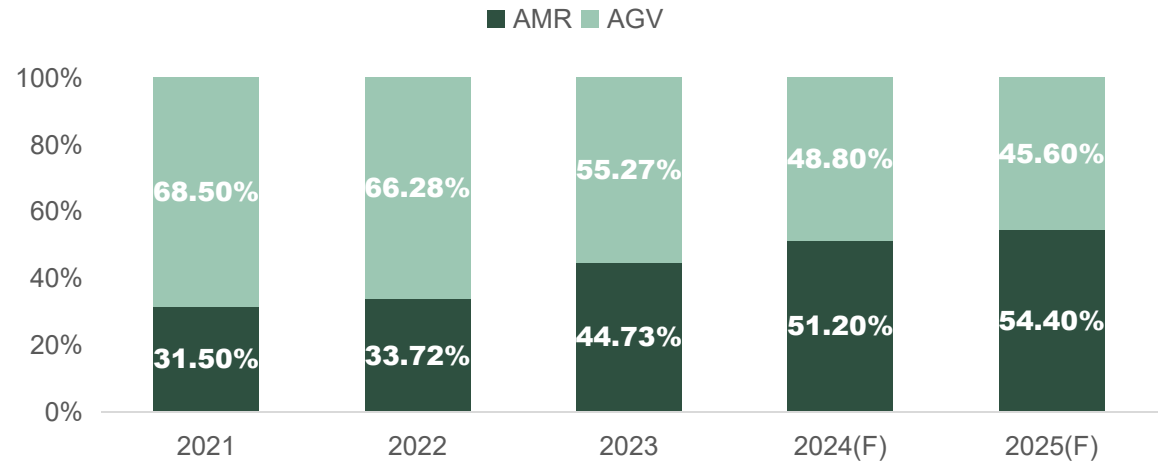
# Global AMR Sales is estimated at 94,000 units

- CMRA estimated the sales volume of AMR worldwide to be around 94,000, accounting for 44.76% of the market volume of mobile robots.
- A closer scrutiny on downstream industries revealed manufacturing industries with the likes of PV, lithium batteries, 3C and semiconductors to be the primary fields of application for AMRs.

**Primary Fields of Applications for AMR in 2023**



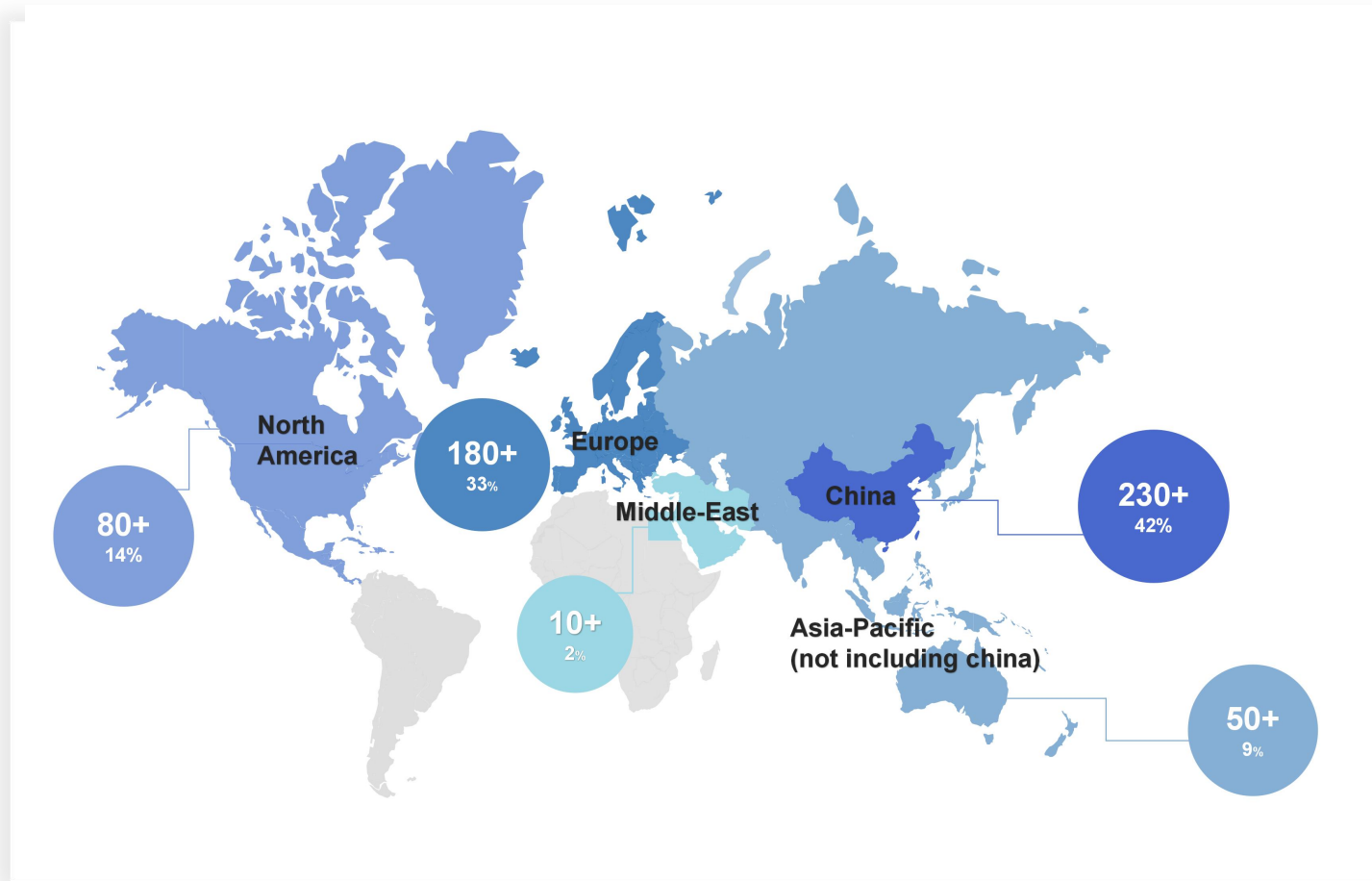
**AMR v.s. AGV from 2021 to 2025**



**02**

**Global Market  
Landscape in 2023**

# Worldwide Distribution of AGV/AMR Providers

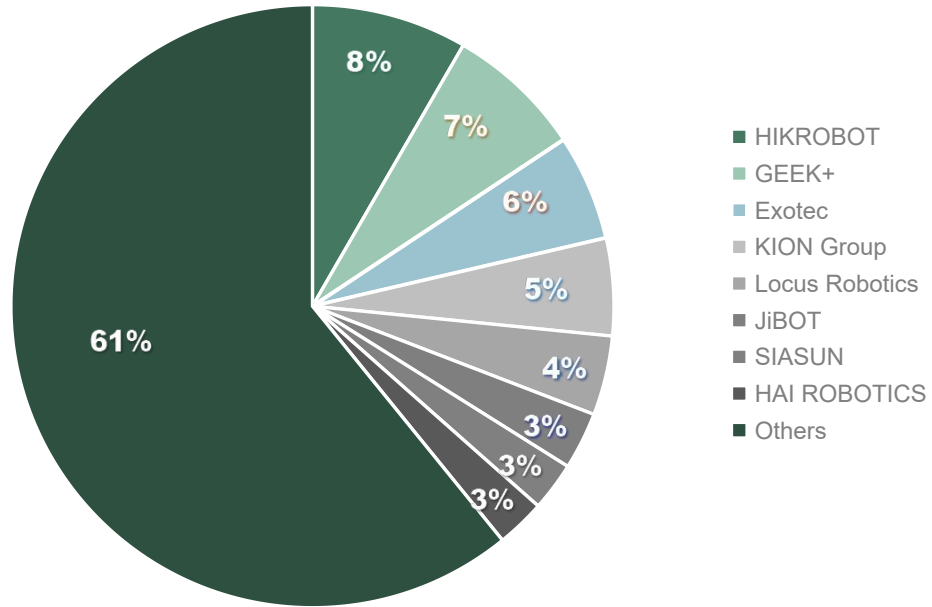


- China is home to the greatest number of mobile robots entities (over 230), followed by Europe and North America.
- Companies from the above regions play as the key drivers for the constant progress of the world's mobile robotics.

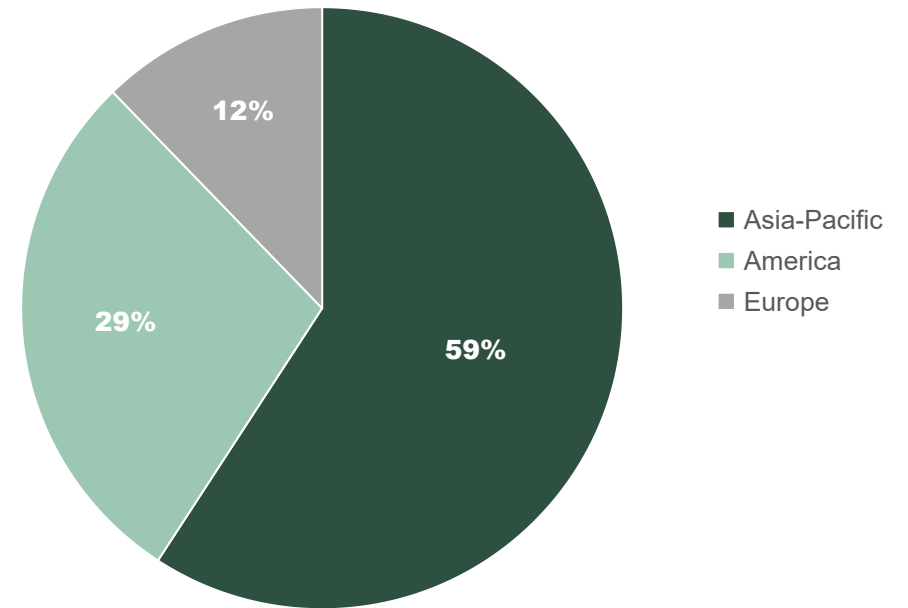
**Chinese firms are expanding their shares in global markets.**

**Asia-pacific attracted most funds in 2023.**

**Market share of top AGV/AMR firms in 2023**



**Number of global AGV/AMR financing events in 2023**



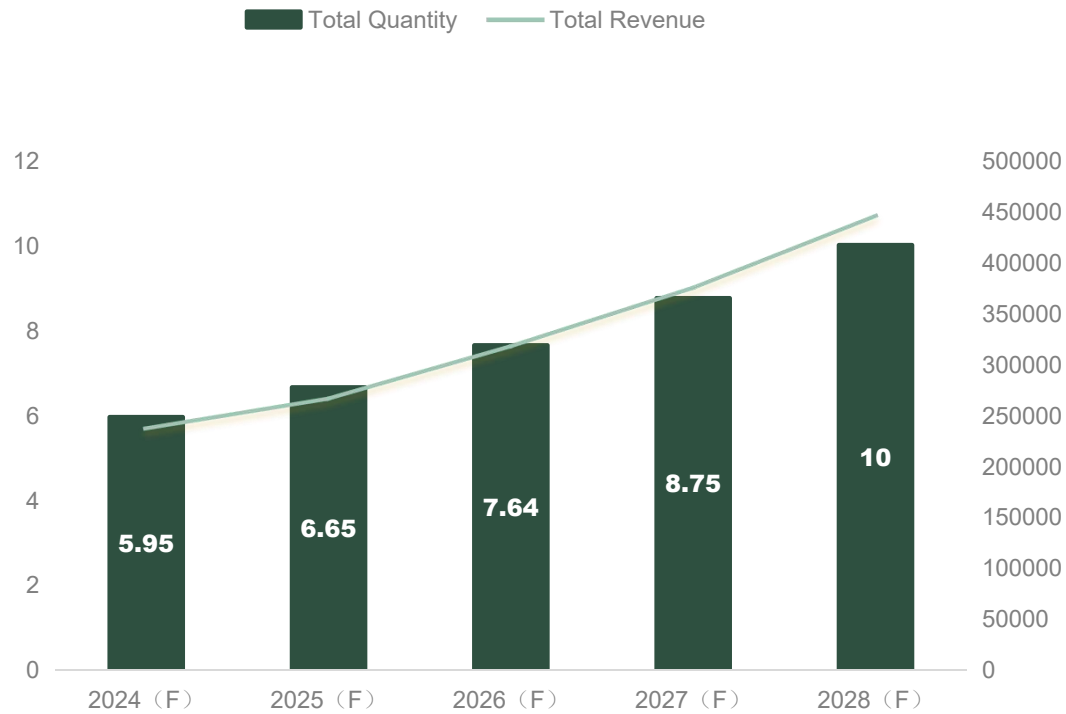
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**Global Market  
Forecast to 2024**

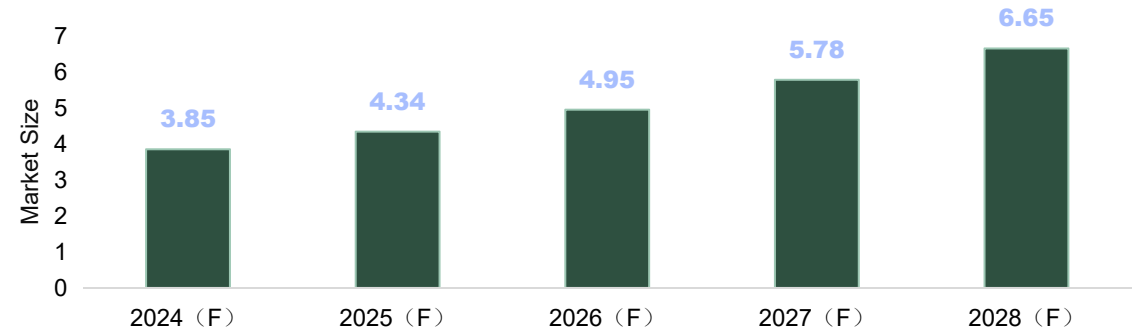
Global market is expected to zoom to USD 5.95 billion in 2024.



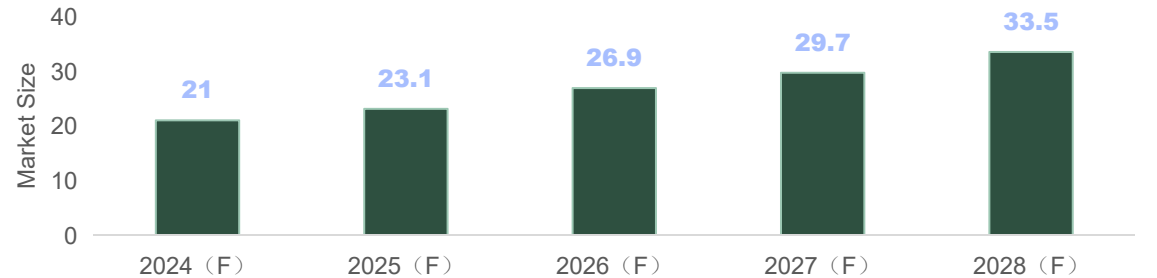
**Global Mobile Robot Market Forecast to 2028 (USD BN)**



**Mobile Robot Sales Forecast in Manufacturing 2024-2027**



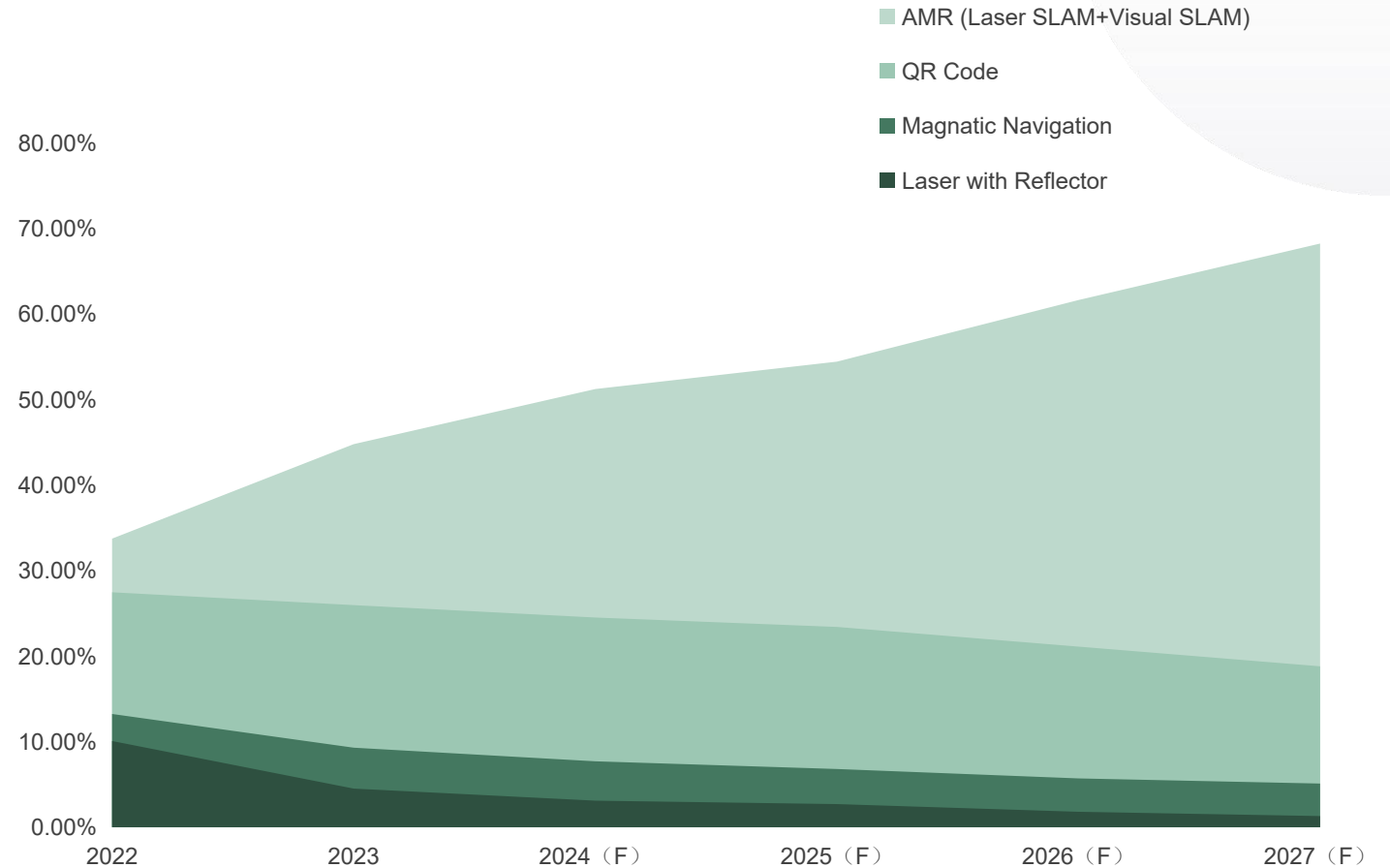
**Mobile Robot Sales Forecast in Logistics 2024-2027 (USD BN)**





**AMR will claim more than half of the market pie in 2024**

**Market Share Forecast to 2027 for Products by Navigation Mode**





# Technological innovations and market growth are slowing down

01

## Technological Innovation

The maturity of mobile robot technologies with the likes of autopiloting, environmental perception, and decision-making controls opened up a wide prospect for mobile robot involvement in a variety of fields. However, we have observed a cooling technological innovation and application landscape in recent years.

02

## Market Dynamics

From a market perspective, the global mobile robot sector has manifested a booming scene in the past few years but is losing its momentum amid a more precarious global economy and a larger market base.

# Global Trends in Mobile Robotics

1

The industry will remain resilient with sufficient confidence expected from most market players.

2

AGV/AMRs will show deeper industrial penetration to encompass all processes and scenarios.

3

Natural navigators will be deployed at an elevated pace.

4

Asia Pacific, North America, and Europe remain as the major markets, while applications in other markets will be on constant growth too.

5

Most intense rivalry is expected to come between Chinese firms and their European and US counterparts.



**04**

**About CMRA**

# About CMRA

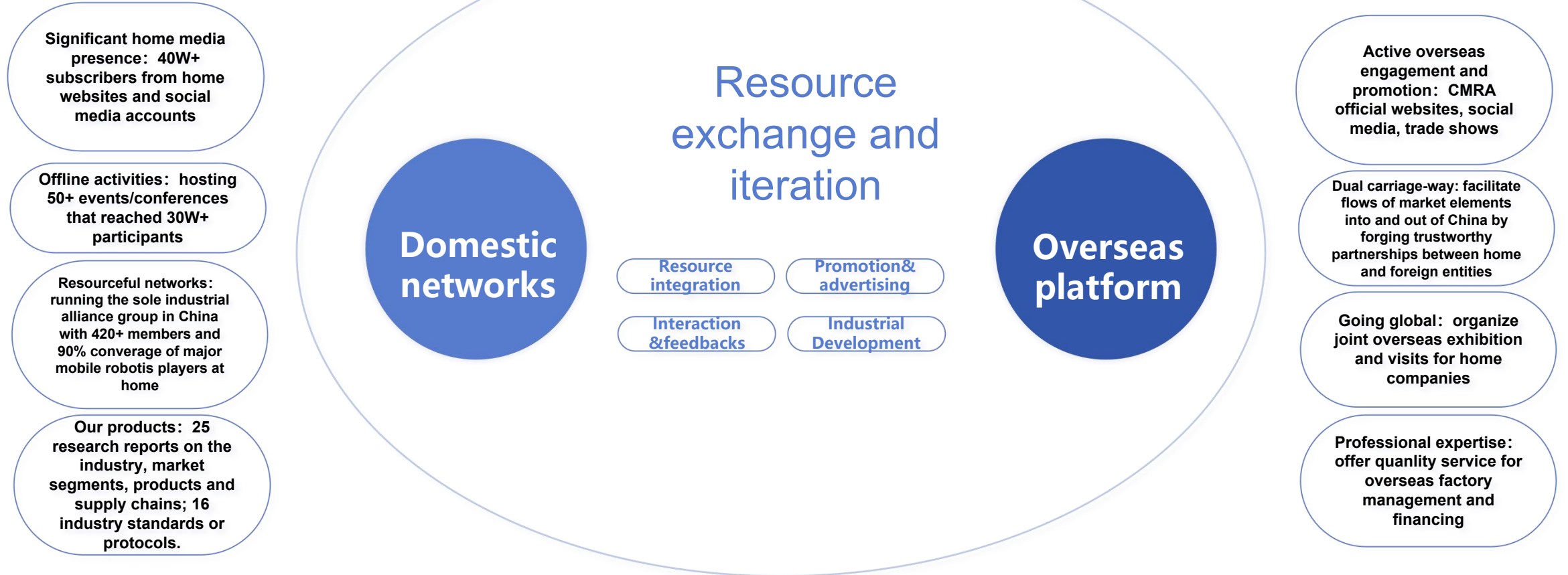
## CMRA Overseas Platforms

CMRA (China Mobile Robot Alliance) is a brand name of New Strategy Media coined for its overseas media operations. We pride ourselves on being the first media platform in mobile robot industry that went abroad. Focused on mobile robots development around the world, CMRA aims to promote the globalization of China's mobile robot industries and create mobile robotic bridges for worldwide joint exploration and mutual prosperity.

The screenshot displays the CMRA website homepage. At the top, the CMRA logo and navigation links (HOME, ABOUT CMRA, EVENTS & NEWS, RESOURCE & RESEARCH, CONTACT US, CHINESE SITE) are visible. The main banner features the text "New Trend International Intelligent Robot Co.,Ltd" and "5G Intelligent Logistics Equipment Leader" alongside images of industrial robots. Below the banner, a "NEWS & MEDIA" section contains several news items:

- 2023-2024 Global Mobile Robot Industry Development Report** (Coming Soon)
- Global Mobile Robot (AGV/AMR) Market Report (2022-2023 Edition)**
- The 6th International Conference on Integrated Applications of Mobile Robots** (12 September 2024)
- Upcoming: Global Mobile Robot (AGV/AMR) Market Report 2024**
- Take a Review on the Global Mobile Robot (AGV/AMR) Market Report (2022-2023 Edition)**
- Upcoming conference: The Sixth International Conference on Integrated Applications of Mobile Robots**
- Global Funding Landscape of Mobile Robotics (AGV/AMR) for Industrial Logistics and Warehouse in the First Half of 2024**
- China's AGV/AMR Export Landmark**
- China's AGV/AMR Export in 2023 is Projected at RMB 4.5 Billion Following a 16-Year Rapid Growth**
- CMRA Joins Hands with Local Authorities and Experts in Changsha to Convene the Fourth Conference on Low-speed Automated Driving**
- China Sees a Stunning Surge of AGV/AMR Sales in Solar Markets Under a Burgeoning Global Mobile Robots Landscape**
- Mobile Robots (AGV/AMR) Demand Spins up Industrial Ladder**
- Automakers differentiate into the race of engineering custom AGVs as**

# Our advantage



**Thank you!**

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