Autonomous mobile robots (AMRs) are a form of automatic guided vehicles (AGVs) that can be implemented without any supporting infrastructure like markers or wires or magnets implanted in the floor or precisely located laser targets.

There are two types of autonomous mobile robots, solutions based on fleet management and solutions that rely on picking optimization. Fleet management solutions typically operate with bigger payloads and route the robots from an origin to a destination. Pick optimization robots integrate the movement of machines and people in a process flow designed to increase picking throughput.

This is one of the fastest growing hardware markets ARC has ever encountered. The growth is fueled by the difficulty in hiring workers that want to work in warehouses or factories in North America and Europe, the increased flexibility of these solutions, the boom in ecommerce, and significant venture capital investments in many of the suppliers in this market.

Previous research on this market has not properly distinguished between solutions like Kiva robotic knock off solutions, which are not truly autonomous, and the new generation of truly autonomous robots. Further, past research has grouped together fleet management and pick optimization solutions. These solutions are very different and have very different growth rates.

For more information, please visit us at www.arcweb.com/market-studies/.

AMRs are an exciting technology getting a great deal of attention. Among the issues addressed in this study:

- How do warehouse hiring and retention trends affect the value proposition for autonomous mobile robots?
- What ROI can users expect?
- How will the patents leading suppliers have applied for and been granted affect growth?
- What are the implications of Robot as a Service pricing?
- How is venture capital impacting this market?

This research is available as a Market Intelligence Workbook (Excel) and/or a concise, executive-level Market Analysis Report (PDF), with or without detailed charts.

**RESEARCH FOCUS AREAS**

**STRATEGIC ANALYSIS**
- Major Trends
- Strategies for Buyers
- Strategies for Product Suppliers
- Market Share Analysis
- Market Forecast Analysis

**COMPETITIVE ANALYSIS**
- Market Shares of the Leading Suppliers
- Market Shares by Region
  - North America
  - Europe, Middle East & Africa
  - Asia
  - Latin America
- Market Shares by Product Type
  - Fleet Management
  - Pick Optimization
- Market Shares by Revenue Category
  - Hardware
  - Software
  - Implementation Services
  - Maintenance Services
  - Robots as a Service
  - Software as a Service
- Market Shares by Industry
  - Automotive
  - Machinery Manufacturing
  - Logistics Service Provider
  - Retail

**MARKET FORECASTS**
- Total Shipments of AMRs
- Shipments by Region
- Shipments by Product Type
- Shipments by Revenue Category
- Shipments by Industry
- Shipments by Payload
- Shipments by Customer Tier

**INDUSTRY PARTICIPANTS**
Profiles are provided for leading suppliers, suppliers with significant venture capital investments, and suppliers with interesting solutions and technology. The profiles include a description of the process used by suppliers to support picking.