2026 AGV-AMR Market Sentiment by Those Living it Everyday

This report started in a very simple way.

Over the last months, talking with manufacturers, integrators, and people involved in AGV and AMR projects, I kept hearing the same question: how do you feel about 2026?

Not in a theoretical way, but in a very practical one.

So I decided to ask directly to the AGV Network Community.

I want to sincerely thank everyone who took the time to answer. Reports like this only make sense when they are built by people who are actually working in the market, dealing with real projects, customers, technical limits, and business pressure.

That's where you get a much more honest picture of how things really look. Every time I run this kind of initiative, I learn something.

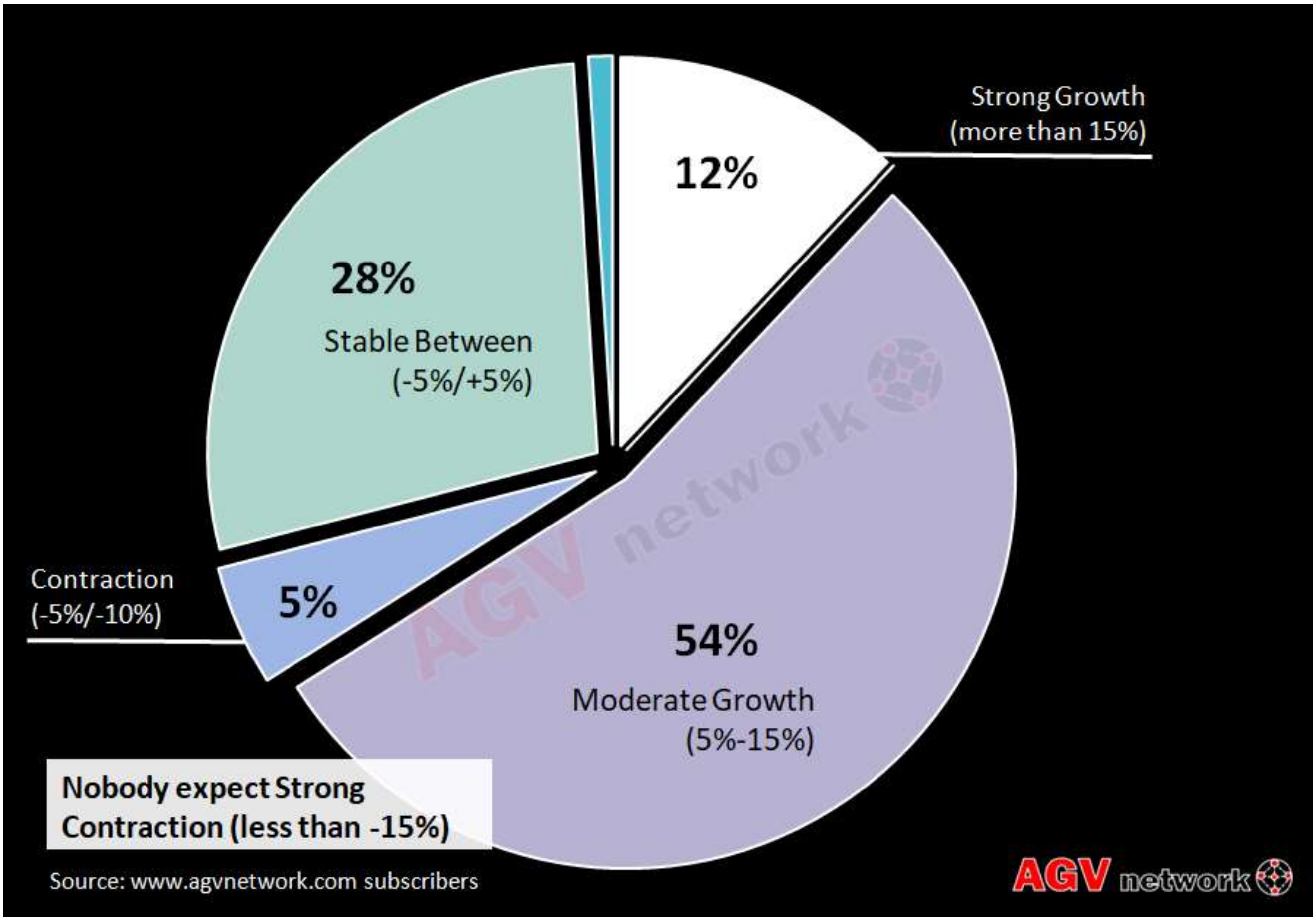
Sometimes the results confirm what I already see in projects. Sometimes they don't. And that's exactly why I find this exercise useful.

In total, 368 professionals (AGV/AMR Manufacturers and Integrators) from all over the world shared their view on how they see the AGV/AMR market evolving in 2026.

I hope you'll find this report interesting and, above all, familiar. Close to what you experience every day in your own work.

Thanks
Alfredo Pastor

How do you expect the overall AGV/AMR market to evolve in 2026?



Someone from FRANCE

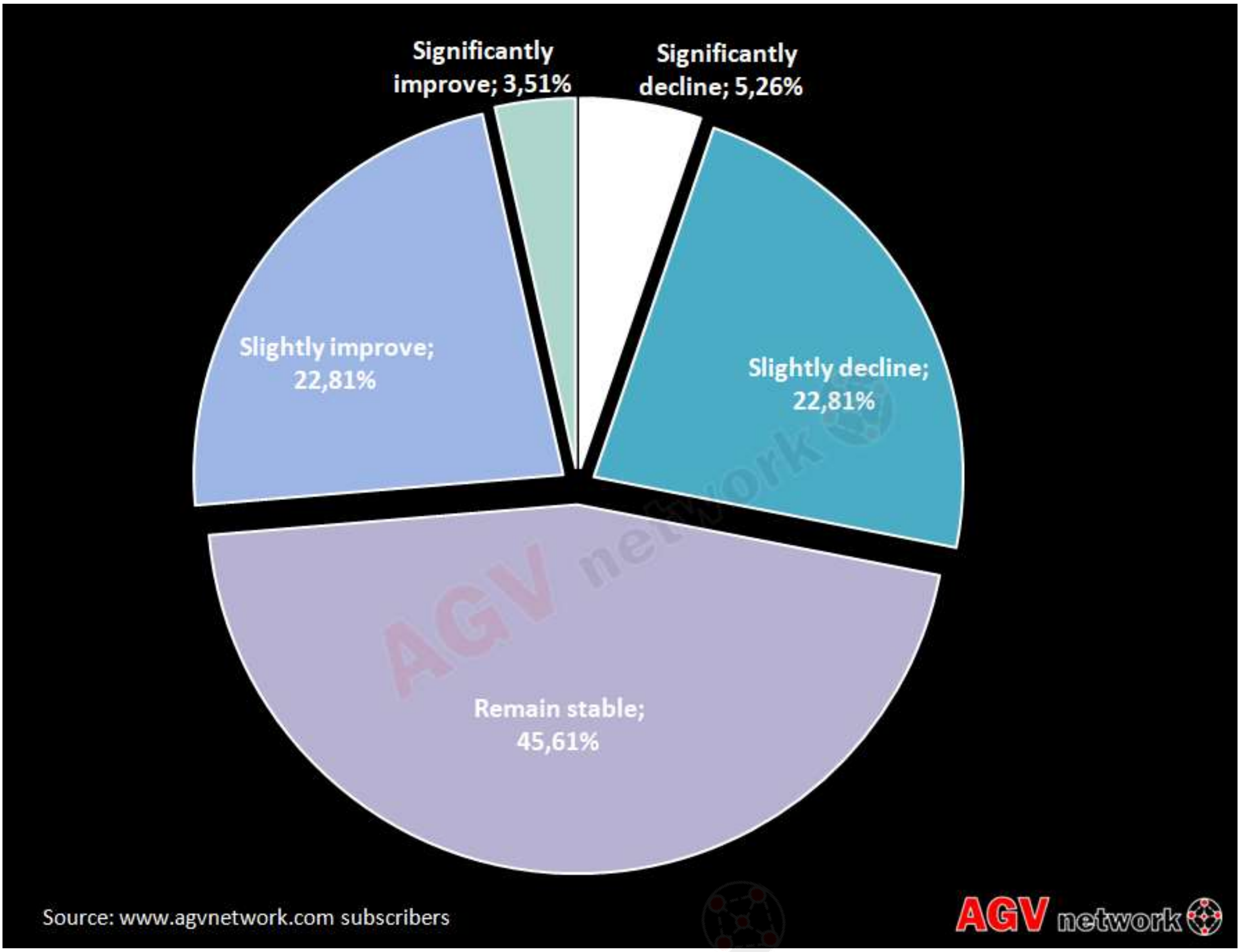
I think that generally, both customers and manufacturers have had to high expectations and requirements for AGV/AMR (4.0 trend), put AGVs everywhere, but after 10 years, real feedbacks and paybacks are known, and promises are not met at all.

I think, but also hope for all of us against unbeatable low cost manufacturers, that Europe customers and integrators will use their brains and local services networks, to partially come back on maybe old, yet very cost effective and robust handling solutions.

Not all flows are good applications for mobile robots, with higher and higher safety stds for such mobile robots. Maybe PLD 3D human like vision will help, but time in the transports will be lost.

To avoid Mudas, don't create any ;-) Finally, new generation of humanoid robots have been introduced on CES, and soon such things wills cost less than 100 000 € (i.e. following high standardization and DTC principles from UR) , which is not even the cost for 2 FTEs ....

How do you expect profitability in the AGV / AMR market to evolve in 2026?



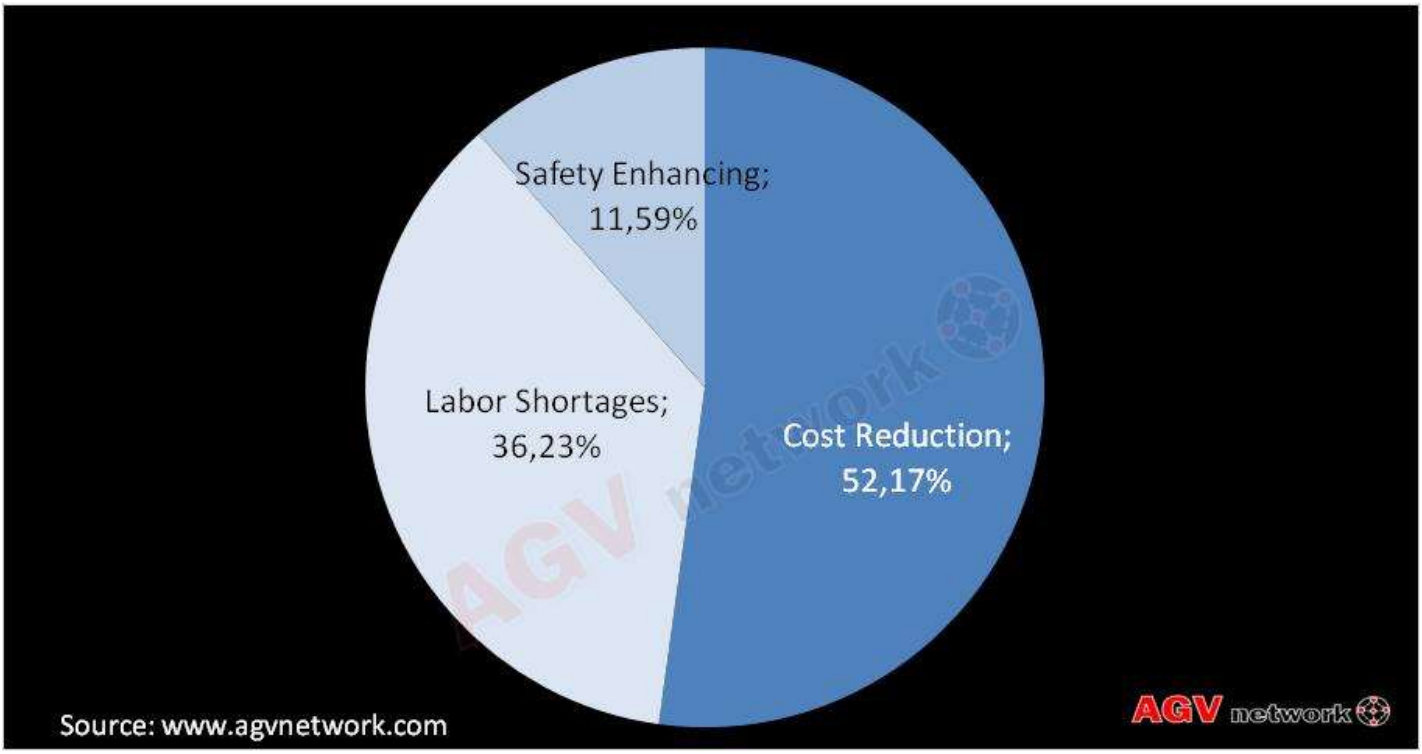
Someone from DENMARK

The market seems a bit slow in Denmark. Companies are waiting.. Maybe for others to gain experience and the world to settle down.

Technically machines gain technology which makes them cheaper and smarter. This is good for smaller companies and makes the market easier to acces.

RaaS will probably gain from this

From your perspective, what will be the main business driver for AGV / AMR projects in 2026?



<u>*Someone from FINLAND*</u>

The market is suffering from lack of "Planungssickerheit" as my German colleague would say. This limits long term investments such as AGV-systems.

<u>*Someone from SLOVAKIA*</u>

Companies prefer features and AGV types which they don't need to decrease costs of own business processing and challenge suppliers with something what they just want but really don't need.

Sadly they are not willing to pay for such features and want top features with price of low cost solution.

<u>*Someone from TURKEY*</u>

"The transformation happening today in intralogistics is the same transformation the PC industry experienced decades ago:

Hardware alone does not create value

Value is created by architecture, software, integration, and use cases"

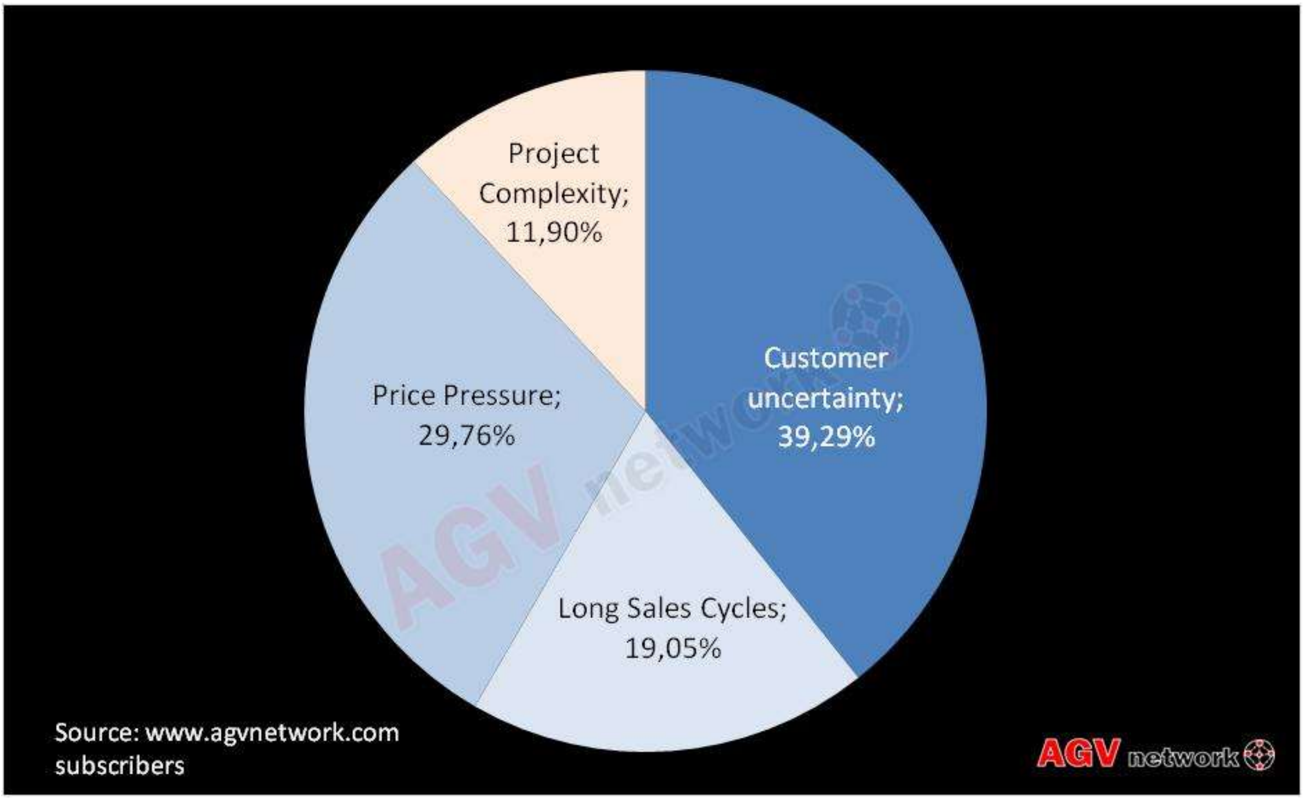
<u>*Someone from ITALY*</u>

The US market is clearly moving in the automation direction, however the adoption rate is still not as fast as expected.

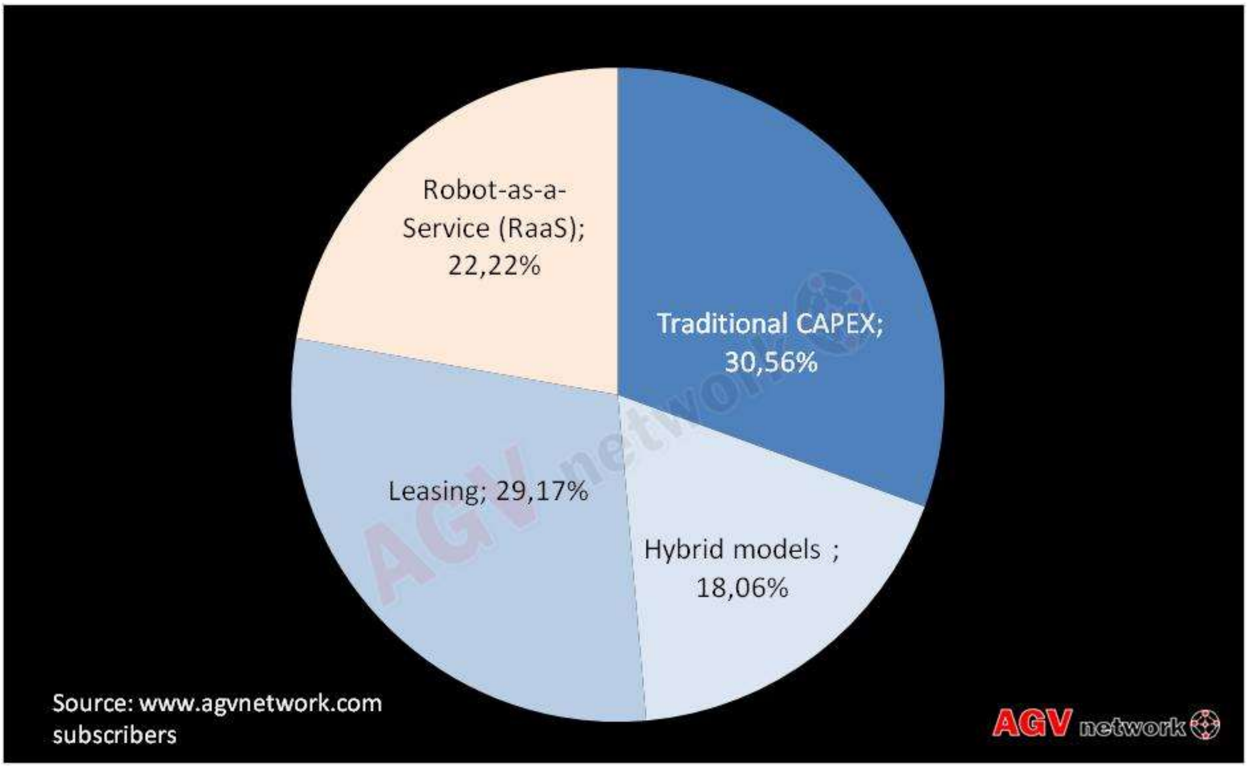
The excess amount of AGV suppliers it's contributing to make the decision difficult, especially considering the limited level of integration with other systems.

The current economy situation is promising, but some companies are very conservative and are not ready to be all-in yet.

What will be the biggest commercial challenge for AGV / AMR suppliers in 2026?



Which business model do you expect to gain more traction in 2026?



<u>*Someone from NETHERLANDS*</u>

#1 We see increasingly: aggressive and (also competent) Chinese suppliers having trouble to bridge the gap between customer question and solution.

Customers having mixed feelings on dependency on Chinese HW, but moreover software.

Chinese suppliers are building EU organizations, but the feeling end customers have is that they can not move with the process changes.

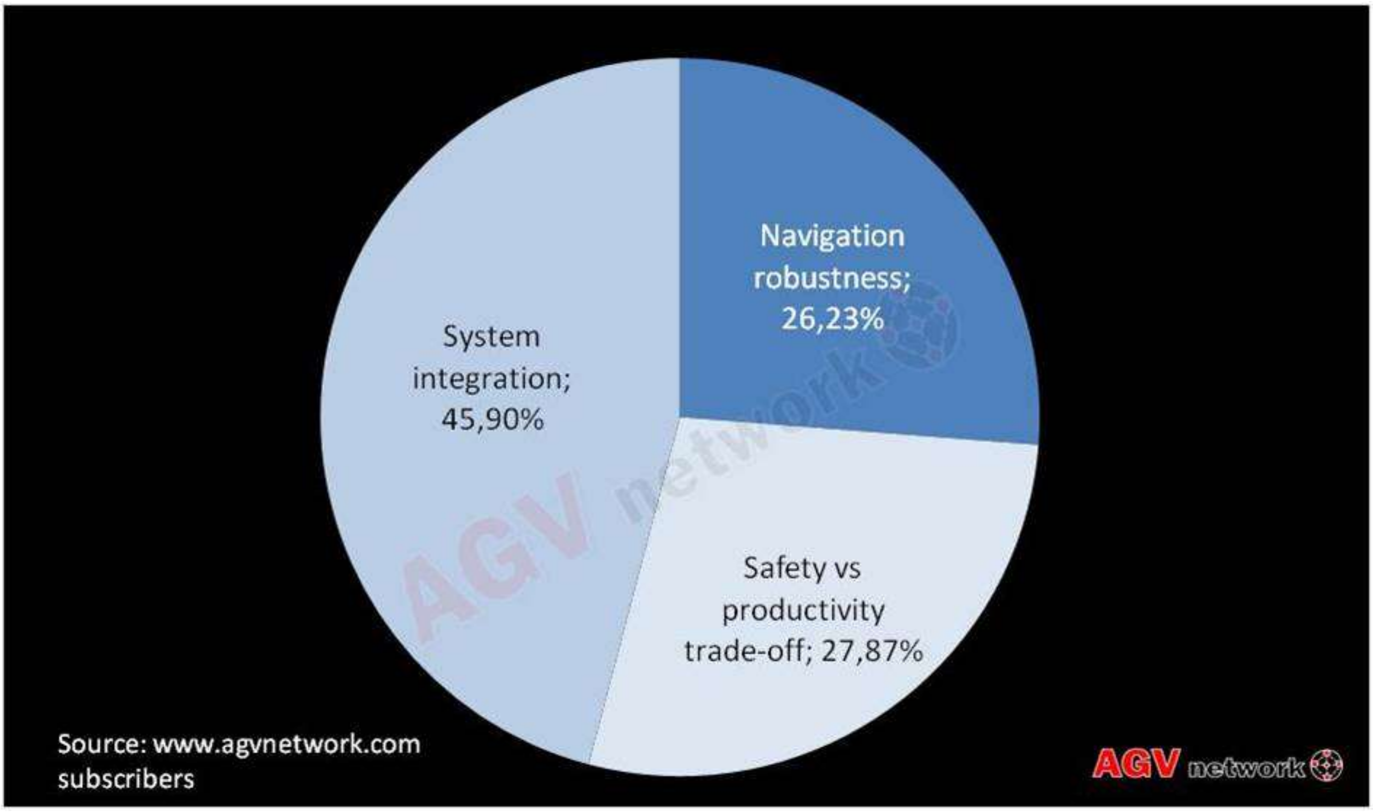
Some EU integrators are selling the Chinese hardware and software. In geopolitical sense - we try to focus on EU partnerships with potential production capacity in Turkey or Asia. Supply chains feel vulnerable.

#2. We see numerous DACH-based AMR/AGV suppliers with an origin in automotive that thought to easily access warehousing logistics.

But none, really successful, as they are a) to expensive and/or b) have to little focus on "swarms" but more on A-to-B fleet managers.

#3 We can imagine a standard like VDA5050 can succeed in automotive (or SEMI conductor), but in warehouse logistics I have not seen it as an competitive strategy yet.

What is currently the biggest technical limitation in AGV / AMR deployments?



<u>*Someone from SINGAPORE*</u>

Customers trust big-name suppliers, smaller developers will find it increasingly difficult to compete with their own AGV/AMR products.

The big players will eventually consolidate the market and most product lines will be sourced from China. In addition, AGV/AMR are facing increasing competition from storage systems (2/4-way shuttles, ASRS, etc.), especially in developed markets with high land prices.

Just a few random thoughts. As you know, this topic can be discussed for hours ;)

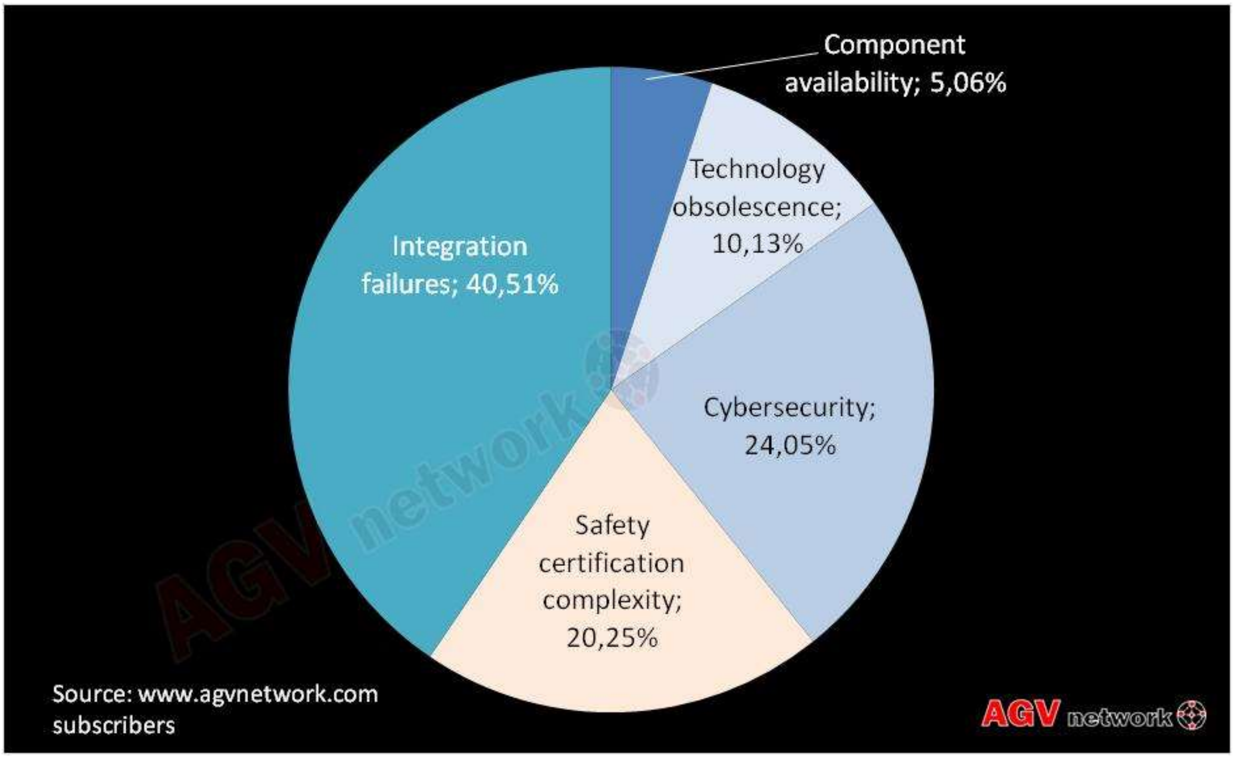
<u>*Someone from NETHERLANDS*</u>

I expect the AMR market to grow in 2026, with increasing interest in AMRs and financial solutions like leasing/RaaS.

That said, the market remains uncertain, as many clients are still unsure if, or how, to invest. AMR is still a relatively new technology, and integration can be complex.

While we anticipate growth, 2025 showed us that expectations often exceeded the actual adoption.

What will be the biggest technical risk for AGV / AMR manufacturers in 2026?



<u>*Someone from BELGIUM*</u>

from a user point of view, key issues are cost competitiveness (capex & OPex) of products to give adequate ROI

<u>*Someone from AUSTRIA*</u>

I think the biggest challenge for European companies will remain the aggressive strategy of their Chinese competitors.

Since the Chinese market is ruinous and there is government support for expansion, this will be unfair behavior.

I hope European customers don't forget that it's not just about price.

I think technical availability, professional project management, and long-term support are just as important as the investment itself!

<u>*Someone from NETHERLANDS*</u>

I'm always hoping for less cowboys.

<u>*Someone from UK*</u>

Many companies see the operational benefits of AGV/AMR technology, but we still see long sales cycles and success mainly in specific (cash rich) industry sectors.

Our technology is generally accepted as being robust, reliable and safe.

We provide our our fleet manager and AGV software and AGV hardware, which is usually seen as an advantage.

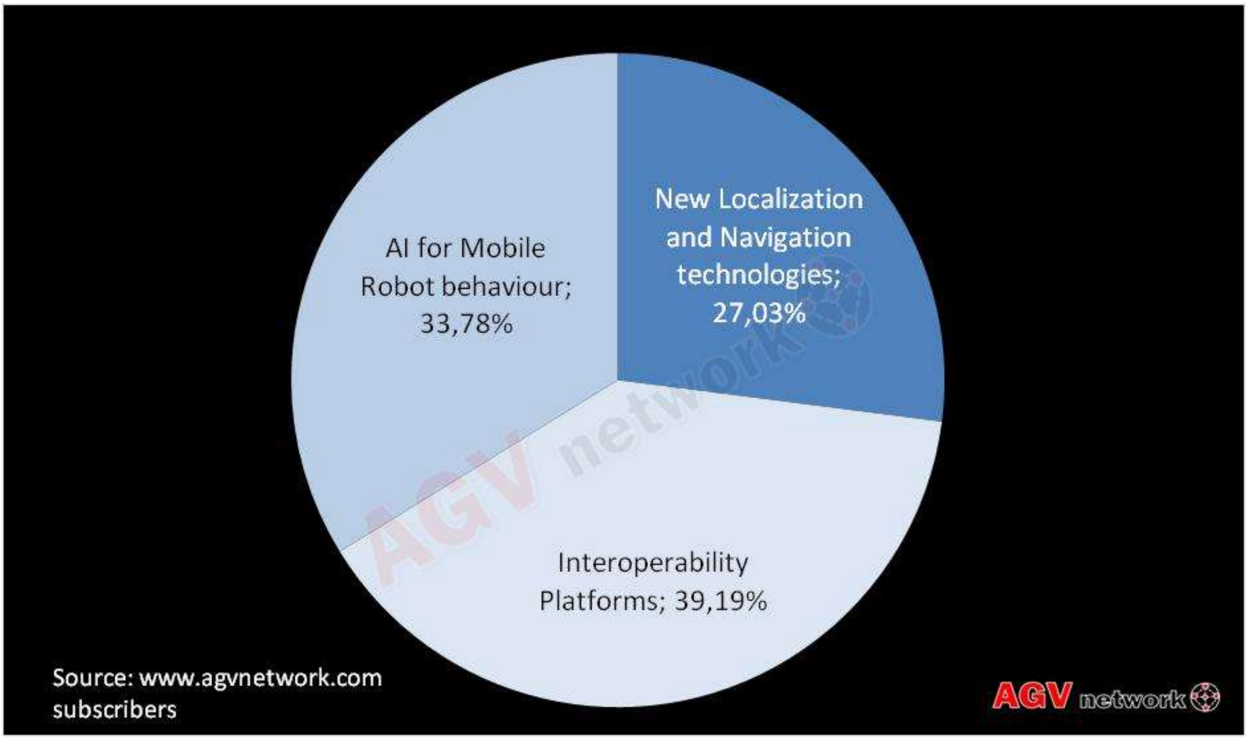
We can also integrate with 3rd party equipment e.g. using VDA5050 standard communication protocol.

Customers often ask for VDA5050 compatibility, but they don't always know why they want this.

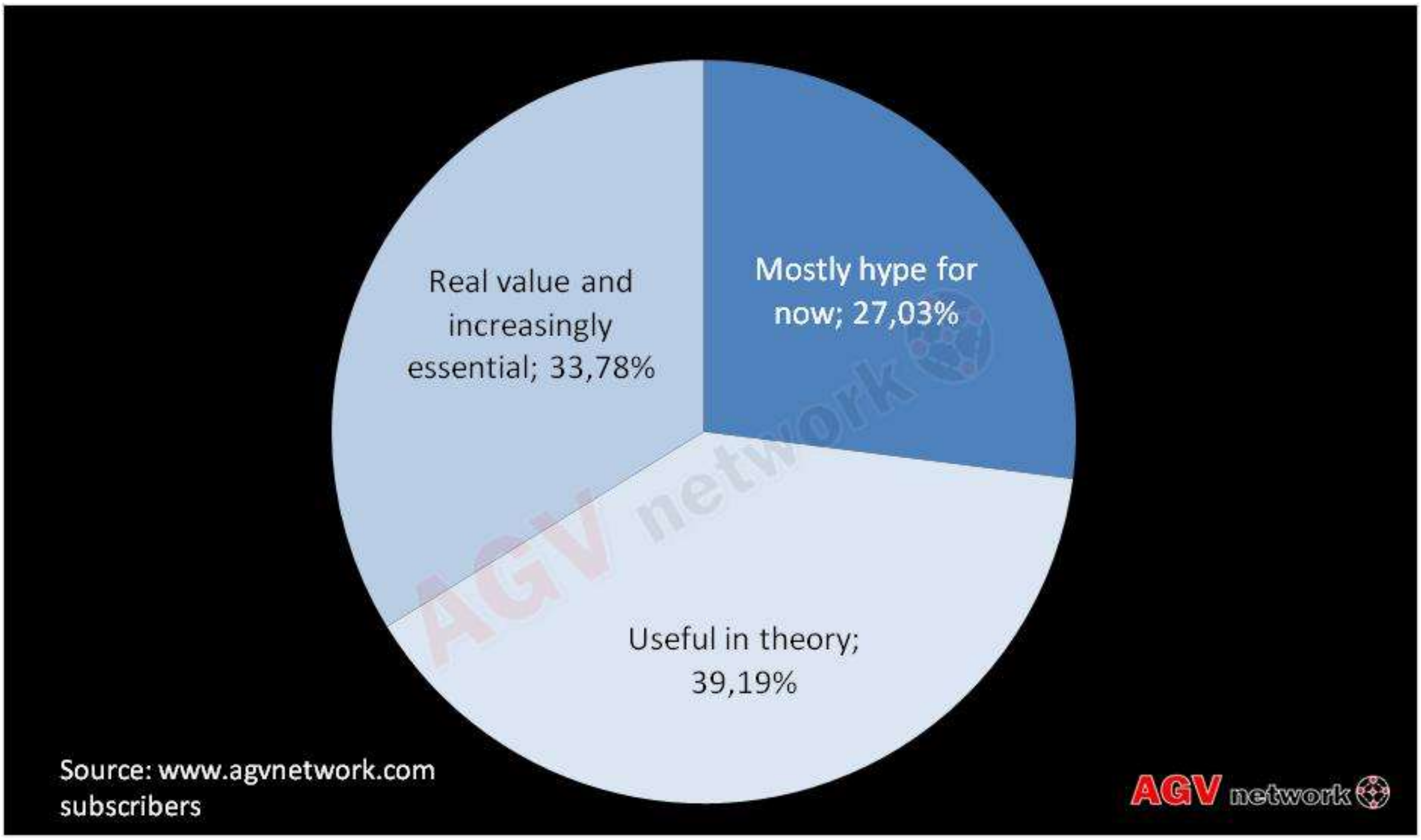
<u>*Someone from POLAND*</u>

Too many small companies attract customers with low prices, then disappear from the market, leaving customers afraid to try AGV/AMR again.

Which technology or technological development do you see as the strongest trend in AGV / AMR systems for 2026?



Fleet orchestration standards (e.g. VDA 5050, ISO 21423): hype or real value?



<u>*Someone from NETHERLANDS*</u>

Although customers remain cautious about investing CapEx in AGV/AMR systems—primarily because these projects involve not only purchasing the equipment but also significant changes to their environment and processes—the topic is far from disappearing.

Labor shortages and rising workforce costs will keep automation on the agenda, even if they extend sales cycles.

On a positive note, we are seeing constraints on the supply side, with some competitors reducing capacity or exiting the market.

This creates opportunities for providers who can deliver bespoke solutions tailored to specific operational needs. Customization and flexibility will be key differentiators in capturing these emerging opportunities.

More Voices from the market:

Someone from USA

Unlike say ~5 years ago, virtually all potential customers are now aware of these solutions, and fall into 2 distinct categories:

1) they have already deployed and worked through challenges, and now are ready to scale. They understand the implementation requirements & challenges but also the benefits, and are placing orders OR

2) they have been on the sidelines, and have either done nothing, maybe seen a few demos, or put in a limited pilot, which likely had a mixed outcome.

Often the outcome was due to lack of sponsorship or tech support internally, but also could have been the AMR was mis-spec'd for the application, often by a distributor or SI that was new to AMR products/industry and 'oversold' the solution.

Regardless of the reason, the customer is not fully bought in to AMRs, and they are now behind the curve, because their labor and productivity challenges continue to be a factor.

As new products continuously come into the market, they are overwhelmed by the options, and fall into 'analysis paralysis'. As a result they are still on the fence, evaluating multiple vendors, etc.

-AMR hardware & even basic fleet software, especially under-ride, are increasingly commoditized. The differentiator and key to success is the relationship and support the distributor, mfg or SI provides.

-- ATL (auto trailer loading/unloading) is closer to a reality for small/mid-sized firms than ever, but even with the newer offerings from Boston Dynamics, Pickle, etc. it's still reserved for the giant firms who piloted these over the last few years and are now are scaling their deployments

-- We still deal with the headaches of AMR's promoting AGV's as 'old tech'. Companies blindly ask for the 'latest' AMR w/ natural nav, etc. even if a simple, line-following AGC with 15 year old tech can do the job for half the cost (or less). It's hard (and frustrating when they don't listen) to convince them they don't need all the bells and whistles

More Voices from the market:

Someone from PORTUGAL

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Someone from AUSTRIA

Many players struggle, so there will be further consolidation. Player who will fight to stay in the business will further drop price levels.

Experience and wide technology range will remain key factor for success. Software will be the dominating differentiator.

CRA and new Machinery regulation will raise the entry bar for asian players.

Someone from GERMANY

Due to strongly developed technology in the private environment, Customers expect a much smarter technology in industry to be already available, that the robots really provide.

Someone from FRANCE

There will be no magic. Market and customers still very confused with the plethoric offer, the price spread and performance between equipments.

More Voices from the market:

<u>Someone from ITALY</u>

From an economic standpoint, LGV market in the EU appears resilient, driven by labor shortages, sustainability regulations, and brownfield modernization, while the US shows strong momentum from reshoring, large greenfield facilities, and productivity investment, albeit with capex scrutiny in a higher-rate environment.

Technically, buyers are prioritizing safety-certified navigation, robust fleet orchestration, seamless WMS/ERP/WCS integration, cyber security, and rich telemetry for data-driven operations.

Advances in Li-ion batteries, opportunity charging, and energy management are lowering total cost of ownership, and hybrid fleets that combine LGVs with AMRs are gaining traction, with interoperability requirements becoming standard.

EU customers typically emphasize lifecycle service, energy efficiency, and CE compliance; US customers focus on scalability, high throughput, and rapid deployment.

Core verticals such as beverage, food, and tissue remain strong, with growing opportunities in building materials and consumer packaged goods. Overall, the outlook is positive, with decisions driven by ROI, reliability, and the ability to integrate automation without disrupting existing processes.

<u>Someone from ITALY</u>

Uncertainty (economically and politically speaking), decrease of end-user spending power and new entrants from China having technological advantages and competitive pricing.

In a word, a storm. Market protection and CE mark respect may mitigate the stability for the current players. credit expansion may improve product demand from end-users.

<u>Someone from NETHERLANDS</u>

Customers are still very hesitant to actually deploy AMR's. Main reason - it is unknown territory for them and they are afraid for (repeat) failures

More Voices from the market:

Someone from ROMANIA

Very concern about the market contraction started couple of years ago.

On top of that, the China's solutions become a real issue for local integrator of EU mobile robots.

Even if they don't look very reliable (white label solutions), they become better and stronger and, without any EU commercial protection, I'm afraid we'll face more and more issues closing the projects.

Is hard to proof to the customer before a project implementation why and EU solution cost twice or 3 timers more then a Chinese solution.

Even if will realize that TCO will be higher after few years of using the solution, that's too late, right?

Even so, I remain positive and our job as integrators or producers is to educate the market and to make them aware about safety compliance and how important is TCO, not only ROI.

But we have sustain this with real data, not with big title on the websites and brochures.

Someone from INDIA

Economic factors, In the warehousing sector, it remains challenging to justify the return on investment for AGV or AMR deployments.

However, AGVs and AMRs have gained significantly higher acceptance in the automotive sector (assembly line automation) and in few manufacturing industries.

Technical factors, There are still notable challenges related to end-to-end software integration, particularly when managing complex AMR fleets that execute multiple, simultaneous transactions.

Seamless coordination between AMRs and peripheral systems or on-floor machinery is not yet fully mature.

As fleet management software evolves and related technical issues are addressed, this level of integration is expected to become more streamlined and reliable.