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1. INTRODUCTION

1.1. REPORT DESCRIPTION

SLAM navigation AMR is an autonomous mobile robot (AMR) that uses simultaneous localization and mapping (SLAM) technology to navigate and map its environment. It is a technique used in robots to create a map of an unknown environment while localizing the robot within that environment. This allows robots to navigate and move autonomously, without relying on pre-existing maps or external guidance. The AMR uses a combination of sensors, such as cameras, LiDAR, or sonar, to gather data and build a map and determine its location.

The demand for SLAM navigation AMR is increasing due to the rising implementation of robotics around the world. Also, the growing integration of advanced technologies such as artificial intelligence (AI) and machine learning (ML) in AMRs is expected to propel the growth of the market. Moreover, the increasing adoption of Industry 4.0 that integrates digital and physical systems in manufacturing and other industries are also further expected to boost the market growth during the forecast period.

However, high cost of implementing SLAM navigation AMRs is expected to restrain the growth of the market. On the other hand, advancements in sensor technology such as LiDAR sensors, depth cameras, and inertial measurement units (IMUs) plays a crucial role in enabling more accurate and reliable SLAM navigation for AMRs is expected to create lucrative growth opportunities for the SLAM navigation market players in future.

The global SLAM navigation AMR market is segmented on the basis of component, type, payload capacity, application, end user industry and geography. Based on the component, the market is categorized into hardware and software. Based on type, the market is classified into mouse, fork, and others. Based on payload capacity, the market is divided into up to 100 KG, 101–200 KG, 201–500 KG, 501–1000 KG, 1001–2000 KG, and 2001–5000 KG. Based on application, the market is bifurcated into towing, lifting, tugging, and other application. Based on end user industry, the market is classified into electronics, semiconductors, FMCGs, automotive, pharmaceuticals, healthcare, logistics, food & beverage, and new energy. The semiconductor industry is further classified into design services, manufacturing services, and packaging & testing. Manufacturing services are further sub-classified into water manufacturing, SMT/PCBA manufacturing, IGBT manufacturing, FPD manufacturing, and others. Geographic breakdown and analysis of each of the aforesaid segments includes regions comprising of North America, Europe, Asia-Pacific, and RoW.

The market comprises of various players such as Gideon Brothers, Omron Corporation, Multiway Robotics (Shenzhen) Company, Iplusmobot Technology Co. Ltd., 6 River Systems, Shanghai Seer Intelligent Technology Corporation, Geekplus Technology Co., Ltd., Mobile Industrial Robots A/S, ABB Ltd., Locus Robotics, Fetch Robotics, GreyOrange Pte. Ltd., OTTO Motors, Seegrid Corporation, Addverb Technologies

Limited, and others. These manufacturers are actively indulging in R&D initiatives, product & technology innovations, and industrial collaborations to enhance their product and increase their growth and geographical reach.

1.2. WHO SHOULD READ THIS REPORT

This report will be valuable for anyone wanting to better understand the leading players in the industry and its underlying dynamics. It will prove useful for businesses who wish to expand into different sectors or explore a new region for expansion of their existing operations. The report comprehensively lays out the product offerings, investments, risks trends, of leading companies and their strategies to help the reader formulate a better-informed business strategy. This report will be ideal for senior executives, business development managers, marketing managers, consultants, CEOs, CIOs, COOs, and Directors, governments, agencies and organizations will also find value in our research report.

1.3. KEY MARKET SEGMENTS

BY COMPONENT

- Hardware
- Software

BY TYPE

- Mouse
- Fork
- Customization

BY PAYLOAD CAPACITY

- Up to 100 KG
- 101–200 KG
- 201–500 KG
- 501–1000 KG
- 1001–2000 KG
- 2001–5000 KG

BY APPLICATION

- Towing
- Lifting
- Tugging
- Other Application

BY END USER INDUSTRY

- Electronics
- Semiconductors
 - Design Services
 - Manufacturing Services
 - Water Manufacturing
 - SMT/PCBA Manufacturing
 - IGBT Manufacturing
 - FPD Manufacturing
 - Others
 - Packaging & Testing
- FMCGs
- Automotive
- Pharmaceuticals
- Healthcare
- Logistics
- Food & Beverage
- New Energy

BY GEOGRAPHY

- North America
 - U.S.
 - Canada
 - Mexico
- Europe
 - UK
 - Germany
 - France
 - Italy
 - Spain
 - Denmark
 - Netherlands
 - Finland

- Sweden
 - Norway
 - Russia
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - South Korea
 - Australia
 - Indonesia
 - Singapore
 - Taiwan
 - Thailand
 - Rest of Asia-Pacific
- Rest of World
 - Latin America
 - Middle East
 - Africa

1.4. KEY MARKET PLAYERS

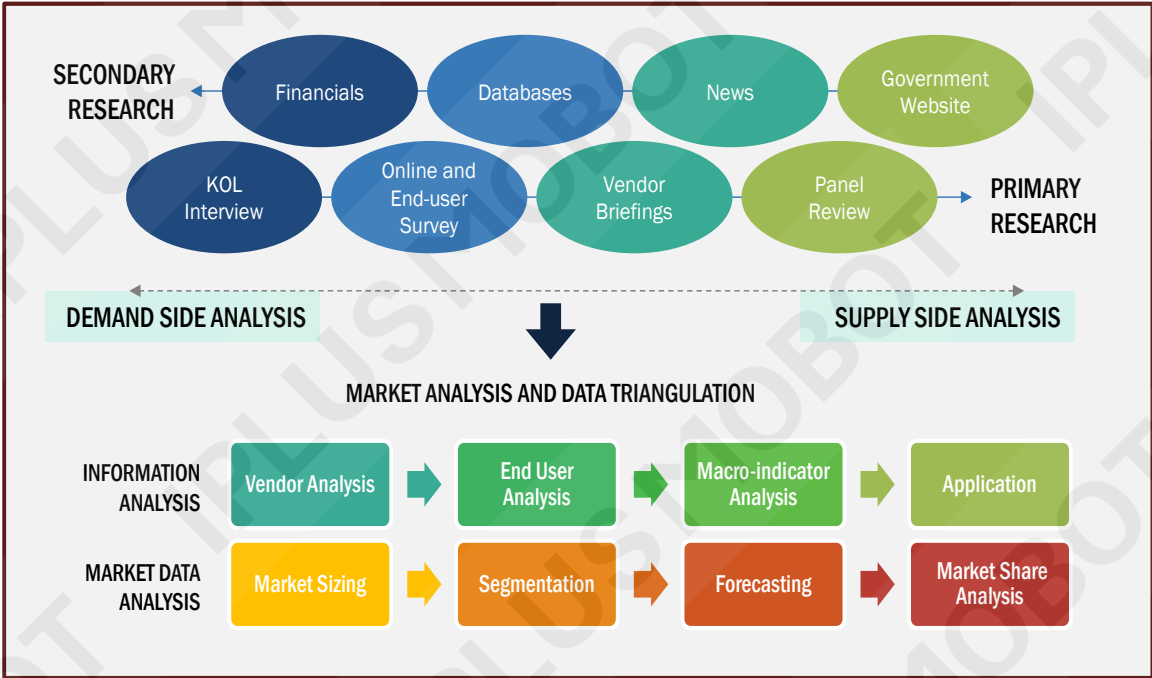
- Mobile Industrial Robots A/S
- Omron
- ABB
- Locus Robotics
- Iplusmobot
- Seegrid
- Otto Motors
- Shanghai Seer Intelligent Technology Corporation
- Multiway Robotics (Shenzhen) Company
- Geekplus Technology Co., Ltd
- GreyOrange
- Addverb Technologies Limited
- Gideon Brothers
- Fetch Robotics
- 6 River Systems



1.5. RESEARCH METHODOLOGY

Next Move Strategy Consulting focuses on extensive secondary research, model building through demand and supply analysis, and estimating the market size based on multiple factors such as GDP, per capita income, product lifecycle, adoption readiness, and growth potential, among many other macro-economic indicators. We have developed extensive statistical forecast models, to estimate the actual demand in terms of values and volume existing in the market. The data is augmented by our internal database and validated by a panel of esteemed KOLs from various industries and regions. In addition, we also follow top-down and bottom-up approach to triangulate our estimations and conduct deep dive analysis of all the niche market segments.

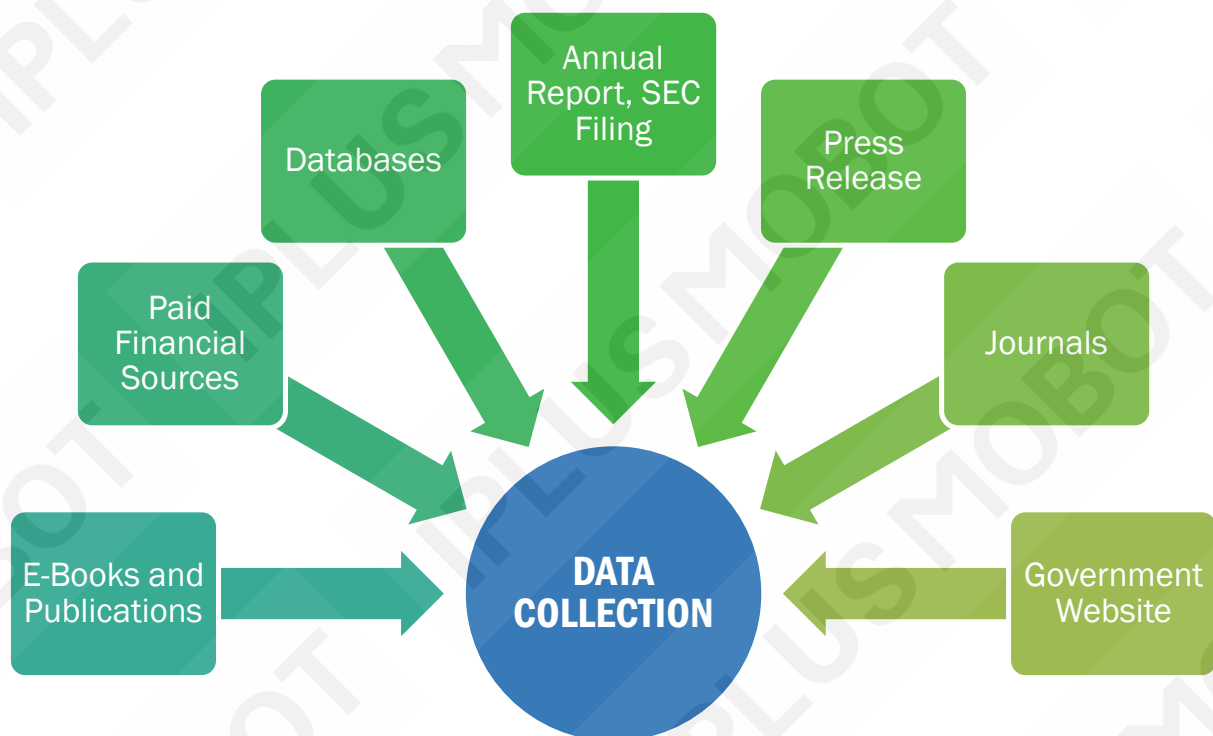
Overview:



1.5.1 SECONDARY RESEARCH

Our analysts conduct extensive secondary research by exploring open-source information and paid databases to gather qualitative as well as quantitative information, which are analyzed and then presented in the report. The secondary research process includes extraction and analysis of data from the below sources:

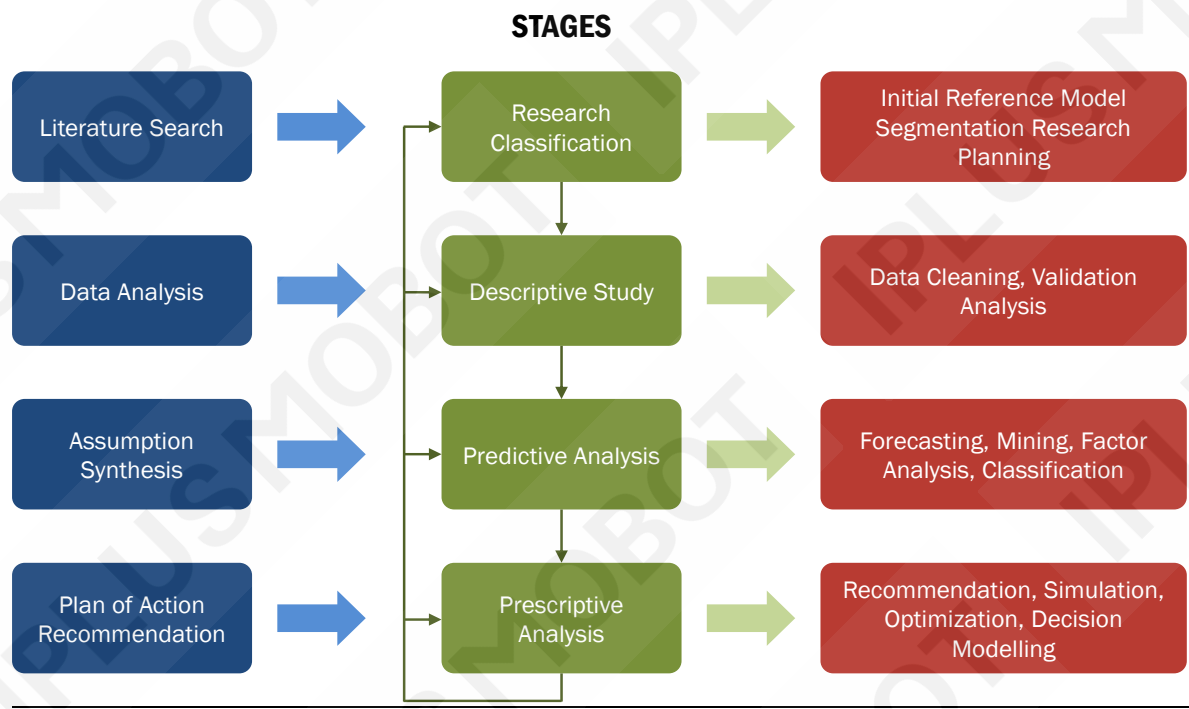
- Company SEC filings, annual reports, 10-K and 10-Q forms, press releases, earning transcripts, broker & financial reports, and investor presentations
- Paid databases such as product sales, volume, sales force databases such as IMS, IPSOS, Symphony, etc.
- Premium data providers such as Cap IQ, Avention, Factiva, Bloomberg to get the information about private companies
- Patent and Regulatory databases to understand regulatory framework, developments
- Government and International databases such as world bank, WHO, industry associations
- News, current developments, articles, blogs





1.5.2 DATA ANALYSIS FRAMEWORK

Data Collated is analyzed in a framework to achieve accuracy and derive insights. Following is a snapshot:





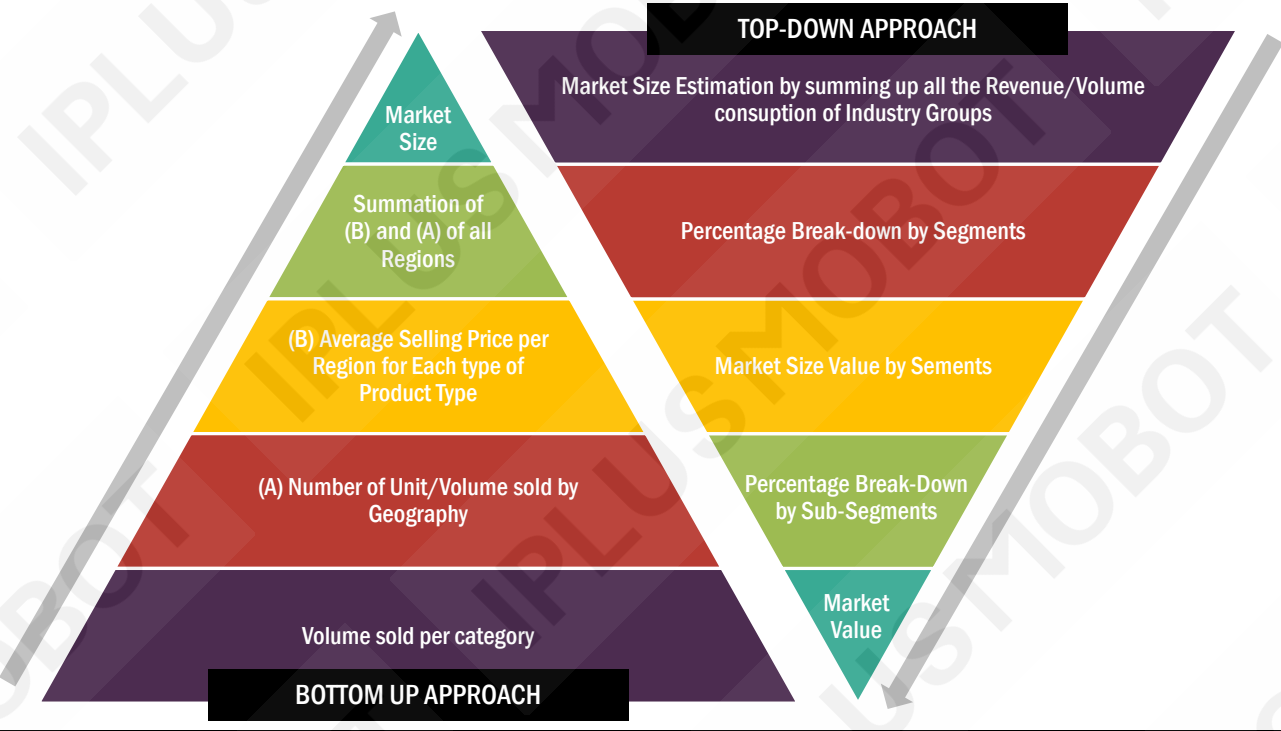
1.5.3 MARKET SIZE ESTIMATION

Market value is estimated using:

Top-down and bottom-up approach: In Bottom-up approach, the data is analyzed at segment, sub-segment or micro-level and then aggregated to arrive at macro market estimate. In this, company level revenue and volume are aggregated to estimate the overall market size. This is validated by Top-Down approach, wherein the macro market is segmented into different regions and sub-segments, based on various assumptions, and percentage splits are assigned. Market size is the quantitative product of market volume or unit sold and the average selling price of the product.

Demand and supply side analysis: Market size is estimated by analyzing demand scenario, consumption patterns, customer pool assumption and analyzing the net sales of the supplier in each market segment

Macro-indicator approach: Various macro-economic factors such as GDP, National expenditure, inflation, consumer price index, consumer confidence survey, and major government statistics are considered and analyzed to estimate market size.

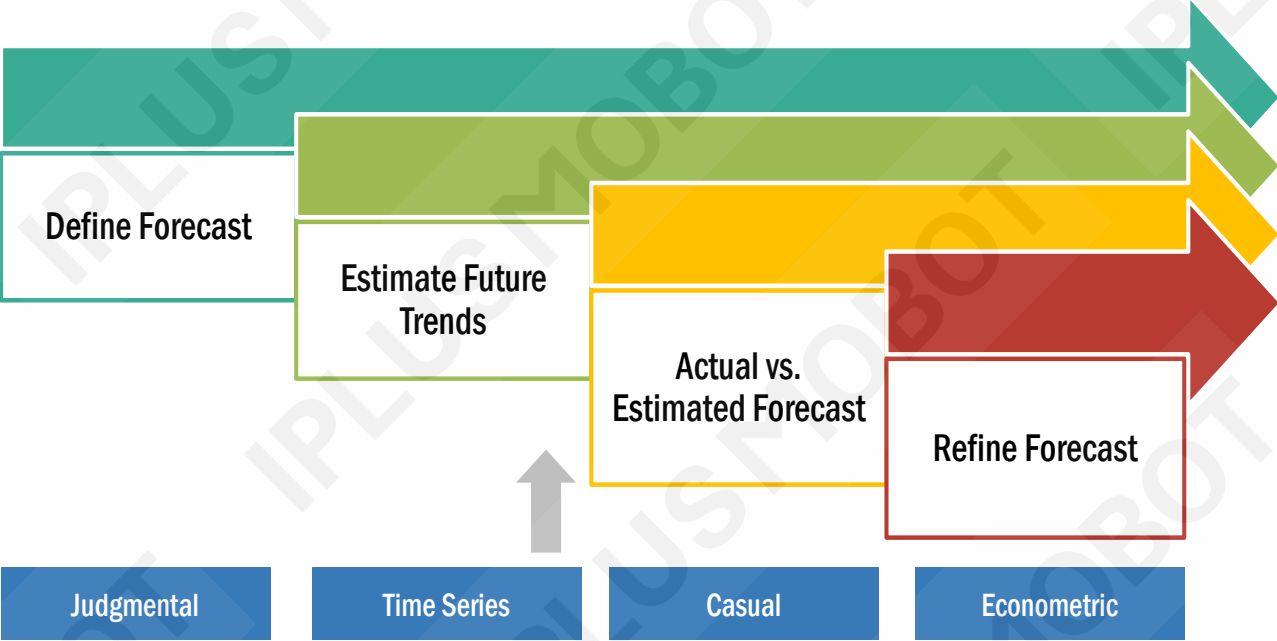




1.5.4 FORECASTING

Various parameters are considered to establish a model that can forecast the future consumption. Demand forecasting is done considering factors such as population, economic scenario, regulation, market competition, drivers, restrains, technological advancements, pricing, etc.

We perform statistical forecasting to derive simulation models. We use different forecasting techniques such as multilinear regression, exponential smoothing, moving average, ARIMA, patient based, Monte-Carlo, capital equipment-based forecasts to achieve highly accurate results. In econometric forecast, we consider short term and long-term event impact and attribute analysis to derive forecast values. Regulatory framework, economic factors, market events are considered as attribute to do such estimation.



1.5.5 PRIMARY RESEARCH AND DATA VALIDATION

We conduct exhaustive primary interviews (face to face, telephonic) to validate our findings and assumptions. Interviewees are the experts across the globe with wide experience in the corresponding market. Supply side KOLs are brand insight managers, supply chain managers, marketing managers, VPs, CEOs, etc. Demand side interviewees are dealers, distributors, wholesalers, retailers etc. Our primary interview panel supports us widely in data validation, providing vital insight and understanding of the market scenario at a grassroots level.

Supply Side

- KOL Interviews
- Interview with CEO, Brand managers, Technology innovators
- Vendor Briefing
- Product Demos

Demand Side

- End User Survey
- Business manager surveys
- Interview with Product purchase manager

2. SLAM NAVIGATION AMR MARKET – EXECUTIVE SUMMARY

2.1. MARKET SNAPSHOT, 2022 - 2030, MILLION USD

SLAM NAVIGATION AMR MARKET		2022	2030	CAGR (2023-2030)
		1.02 Bn	3.13 Bn	14.2%
Omron	MIR	Locus Robotics	Iplusmobot	Seegrid
Otto Motors	GreyOrange	ABB	Seer	Geekplus
SEGMENTS	SUB-SEGMENTS	REVENUE - 2022 USD Mn	FORECAST - 2030 USD Mn	CAGR % (2023-2030)
Component	Hardware	660.3	1789.5	12.4
	Software	358.8	1339.3	17.0
Type	Mouse	418.8	997.9	10.6
	Fork	399.9	1336.3	15.4
	Ccustomization	200.3	794.5	17.8
Payload Capacity	Up to 100 KG	214.0	602.7	12.9
	101-200 KG	124.8	518.0	18.5
	201-500 KG	126.5	413.0	15.0
	501-1000 KG	140.3	511.3	16.6
	1001-2000 KG	221.4	555.5	11.3
	2001-5000KG	192.0	528.4	12.6
Application	Towing	90.4	339.7	17.1
	Lifting	618.2	1748.6	13.0
	Tugging	166.5	543.2	15.0
	Other Application	144.0	497.2	15.9
End User Industry	Electronics	87.9	293.7	15.4
	Semiconductor	72.4	253.8	16.0
	FMCGs	113.2	333.6	13.6
	Automotive	84.5	318.7	17.1
	Pharmaceutical	95.9	347.7	16.6
	Healthcare	110.6	348.2	14.5
	Logistics	251.6	601.8	10.6
	Food & Beverage	143.7	392.1	12.5
	New Energy	59.3	239.3	18.1
GEOGRAPHY	COUNTRY	REVENUE - 2022 USD Mn	FORECAST - 2030 USD Mn	CAGR % (2023-2030)
North America	U.S.	322.8	783.7	10.8
	Canada	25.7	76.5	13.7
	Mexico	14.0	43.4	14.2
Europe	UK	43.3	84.6	7.8
	Germany	51.9	93.1	6.6
	France	26.6	56.3	8.9
	Italy	21.0	52.6	11.3
	Spain	24.8	67.2	12.3
	Denmark	8.5	25.7	13.9
	Netherlands	15.8	44.5	12.9
	Finland	16.8	53.4	14.5
	Sweden	4.9	17.1	15.8
	Norway	2.9	11.1	16.9
	Russia	2.7	5.9	9.6
	Rest of Europe	4.7	12.9	12.4
Asia-Pacific	China	83.7	276.1	15.1
	Japan	41.9	167.1	17.9
	India	15.3	80.0	21.8
	South Korea	51.5	192.5	16.9
	Australia	22.5	95.8	18.9
	Indonesia	7.8	49.1	24.6
	Singapore	26.4	119.9	19.8
	Taiwan	12.5	69.3	22.8
	Thailand	10.9	64.8	23.8
	Rest of Asia-Pacific	25.0	120.1	20.6
Rest of World	Latin America	86.2	284.2	15.2
	Middle East	31.3	111.8	16.3
	Africa	17.9	69.9	17.6

Source: Primary Research, Secondary Research, NMSC Analysis

3. MARKET OVERVIEW

3.1. MARKET DEFINITION AND SCOPE

SLAM navigation AMR is an autonomous mobile robot (AMR) that uses simultaneous localization and mapping (SLAM) technology to navigate and map its environment. It is a technique used in robots to create a map of an unknown environment while localizing the robot within that environment. This allows robots to navigate and move autonomously, without relying on pre-existing maps or external guidance. The AMR uses a combination of sensors, such as cameras, LiDAR, or sonar, to gather data and build a map and determine its location.

SLAM navigation AMRs enable independent functioning in a variety of environments, including complicated, unpredictable, or unfamiliar. It is valuable for industries such as automotive, logistics, and foods & beverages, where robots must navigate through dynamic environments with constantly changing obstacles, including moving objects.

Moreover, this system reduces the cost and time required to create accurate maps as the AMR can create a map while operating. Hence, it enhances capabilities of robots, enabling them to perform tasks that would be difficult or impossible for humans, making them more effective & versatile tools for a wide range of applications.

The global SLAM navigation AMR market is segmented on the basis of component, type, payload capacity, application, end user industry and geography. Based on the component, the market is categorized into hardware and software. Based on type, the market is classified into mouse, fork, and customization. Based on payload capacity, the market is divided into Up to 100 KG, 101–200 KG, 201–500 KG, 501–1000 KG, 1001–2000 KG, and 2001–5000 KG. Based on application, the market is bifurcated into towing, lifting, tugging, and other applications. Based on end user industry, the market is classified into electronics, semiconductors, FMCGs, automotive, pharmaceuticals, healthcare, logistics, food & beverage, and new energy. The semiconductor industry is further classified into design services, manufacturing services, and packaging & testing. Manufacturing services are further sub-classified into water manufacturing, SMT/PCBA manufacturing, IGBT manufacturing, FPD manufacturing, and others. Geographic breakdown and analysis of each of the aforesaid segments includes regions comprising of North America, Europe, Asia-Pacific, and RoW.

3.2. MARKET DYNAMICS

3.2.1 DRIVERS

3.2.1.1 INCREASE IN ADOPTION OF ROBOTICS

Adoption of robotics in various industries such as automotive, electronics, and foods & beverages has increased, which has led to development & adoption of SLAM Navigation AMRs. According to the 2021 World Robot Report, the global average robot density in manufacturing industries has doubled in the past five years, with 126 robots per 10,000 employees. This increasing trend indicates the growing importance of automation and need for more advanced robotics technologies, such as SLAM Navigation AMRs, to optimize manufacturing processes, improve efficiency, and reduce costs. In addition, the ability of these robots to navigate their surroundings is crucial for their effectiveness and efficiency in various industries, such as logistics, pharmaceuticals, and automotive. Hence, with rise in use of robots continues, demand for advanced SLAM navigation AMRs is expected to increase.

This trend has driven development of more sophisticated algorithms & sensors and integration of SLAM navigation AMRs into a growing number of robotic systems. For instance, in March 2022, Geek+ and Bosch Rexroth have extended their partnership agreement to develop and deploy new technologies. As part of the partnership, the companies have collaborated to create a unique version of Geek+'s MP1000R moving robot that integrates Bosch Rexroth's laser localization software ROKIT Locator. Thus, development and implementation of advanced robotics continues to grow in the future, which is expected to propel the market growth.

3.2.1.2 INTEGRATION OF ADVANCED TECHNOLOGIES IN AMR

Integration of advanced technologies such as artificial intelligence (AI) and machine learning (ML) in AMRs is also a significant driver of the market growth. These technologies allow SLAM navigation AMRs to make intelligent decisions and adapt to changing environments, enhancing their efficiency and reliability. AI and ML algorithms enable SLAM navigation AMRs to learn from their experiences and optimize their performance, improving their accuracy and reducing the need for human intervention. In addition, integration of AI and ML enables SLAM navigation AMRs to work collaboratively with other robots and humans, making them more versatile and effective in various applications.

3.2.1.3 INCREASE IN ADOPTION OF INDUSTRY 4.0

Industry 4.0, also known as the fourth industrial revolution, is a term used to describe the integration of digital and physical systems in manufacturing and other industries. The integration of digital systems involves use of technologies such as the Internet of Things (IoT), artificial intelligence (AI), and machine learning (ML) to connect machine, systems, and people. The goal of Industry 4.0 is to create a smart factory where digital technologies are used to optimize production processes, improve efficiency, and reduce costs.

SLAM Navigation is a key technology for Industry 4.0 as they can operate independently, adapt to changing environments, and communicate with other machines and systems. These robots are used to transport materials & products and to navigate complex environments and avoid obstacles. Hence, as more companies embrace Industry 4.0 and seek to create more efficient and flexible production processes, demand for SLAM navigation AMRs is expected to grow.

3.2.2 RESTRAINTS

3.2.2.1 HIGH IMPLEMENTATION COSTS

High cost of implementing SLAM navigation AMRs limits growth of the market. Incorporation of advanced sensors, LiDAR scanners, and other hardware components contribute toward high implementation costs. High costs make it challenging for small and medium-sized enterprises to adopt the technology, thereby hampering the market growth.

3.2.3 OPPORTUNITIES

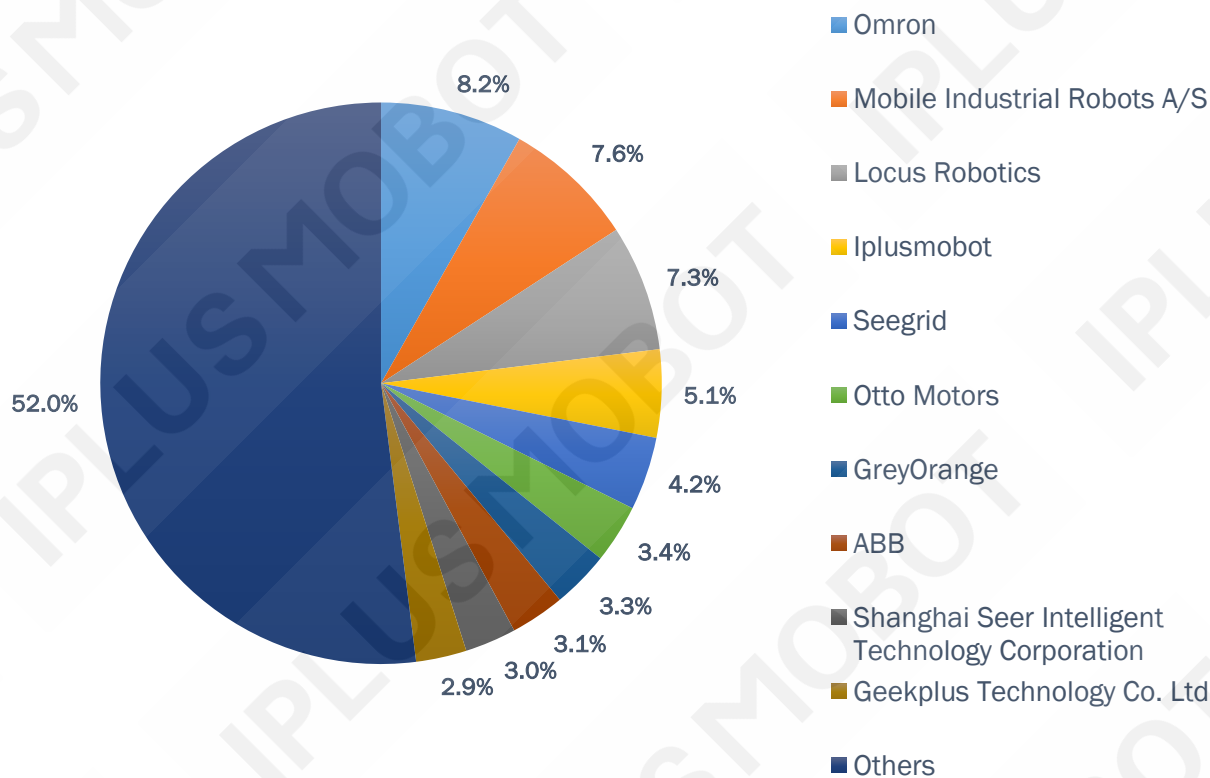
3.2.3.1 ADVANCEMENTS IN SENSOR TECHNOLOGY

Advancements in sensor technology plays a crucial role in enabling more accurate and reliable SLAM navigation for AMRs. LiDAR sensors, depth cameras, and inertial measurement units (IMUs) provide detailed information about surroundings of robots, such as distance to obstacles, angular rate, location of objects, and orientation of robots. This information is then used by SLAM navigation AMRs to create a map of the environment and enable the robot to navigate autonomously. Development of more advanced sensors with higher accuracy and resolution has led to increased adoption of these systems in various industries, from logistics to pharmaceuticals. Hence, the evolving sensor technology is anticipated to enhance precision and efficiency of SLAM Navigation AMRs, which is expected to provide ample growth prospects for the market in the future.

4. MARKET SHARE ANALYSIS

4.1. MARKET SHARE ANALYSIS OF TOP SLAM NAVIGATION AMR PROVIDERS, 2022

FIGURE 1. MARKET SHARE ANALYSIS OF TOP SLAM NAVIGATION AMR PROVIDERS, 2022



Source: Primary Research, Secondary Research, Next Move Strategy Consulting

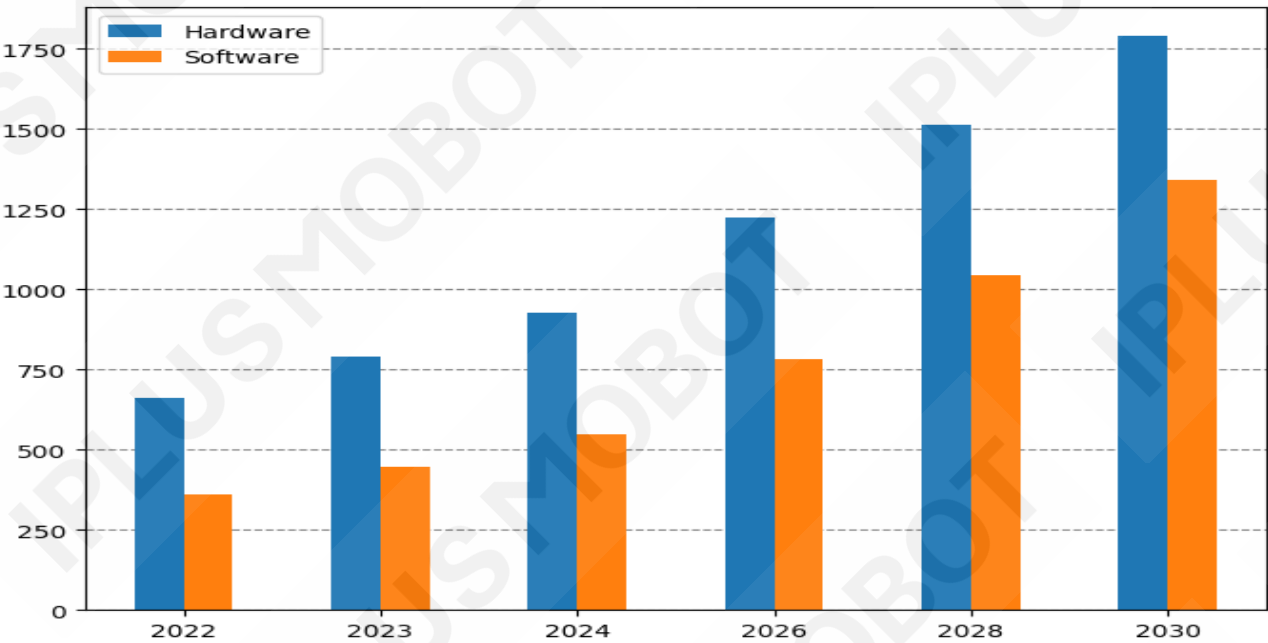


5. GLOBAL SLAM NAVIGATION AMR MARKET, BY COMPONENT

5.1. OVERVIEW

By component, the market is divided into hardware and software.

FIGURE 2. GLOBAL SLAM NAVIGATION AMR MARKET VALUE, BY COMPONENT, 2022-2030, MILLION USD



Source: Primary Research, Secondary Research, NMSC Analysis

TABLE 1. GLOBAL SLAM NAVIGATION AMR MARKET VALUE, BY COMPONENT, 2022-2030, MILLION USD

Component	2022	2023	2024	2026	2028	2030	CAGR % (2023-2030)
Hardware	660.26	790.0	926.71	1225.02	1510.33	1789.45	12.39%
Software	358.82	447.17	546.21	782.37	1044.44	1339.3	16.97%
Total	1019.08	1237.17	1472.92	2007.39	2554.77	3128.75	14.17%

Source: Primary Research, Secondary Research, NMSC Analysis

The Global SLAM Navigation AMR Market was valued at \$1019.08 Million in 2022, and is projected to reach \$3128.75 Million by 2030 growing at a CAGR of 14.17% from 2023 to 2030. Hardware segment is expected to be the highest contributor to this market, with \$660.26 Million in 2022, and is anticipated to reach \$1789.45 Million by 2030, registering a CAGR of 12.39% from 2023 to 2030. Software segment is anticipated to reach \$1339.3 Million by 2030 with the highest CAGR of 16.97%.