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Global AGV/AMR Swivel Caster Market Growth 2026-2032

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Abstracts

The global AGV/AMR Swivel Caster market size is predicted to grow from US$ 71.61 million in 2025 to US$ 170 million in 2032; it is expected to grow at a CAGR of 13.1% from 2026 to 2032.

AGV/AMR Swivel Caster refers to a passive swivelling caster assembly specifically designed or qualified for Automated Guided Vehicles and Autonomous Mobile Robots. The caster supports vehicle load while allowing the wheel assembly to rotate freely around a vertical swivel axis as the mobile platform changes direction. Major product forms include single-wheel swivel casters, twin-wheel swivel casters, low-profile compact casters and suspension or shock-absorbing swivel casters. Typical structures incorporate a steel or high-strength metal bracket, precision swivel bearing system, wheel bearings and polyurethane, rubber, polyamide or other engineered tread materials. Key performance characteristics include load capacity, wheel diameter, rolling resistance, swivel resistance, starting resistance, durability under continuous operation, allowable travelling speed, shock absorption, vibration control, tread hardness, temperature resistance and dimensional compatibility with the AGV or AMR chassis. The research scope covers passive swivel casters used as support, balancing and load-bearing mobility components in AGVs and AMRs, while drive wheels, fixed casters, mecanum wheels and complete AGV or AMR vehicles are excluded.

Key Findings

Global product production reached approximately 620,000 units in 2025

The global average market price was approximately USD 118 per unit

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Global production capacity was approximately 820,000 units

Gross margins of major industry participants were approximately 28%–40%

Warehousing and logistics, automotive manufacturing, general industrial manufacturing, food and beverage, pharmaceuticals, healthcare, and retail fulfillment are the primary application markets

Market Trends

The AGV/AMR Swivel Caster market is developing toward lower rolling resistance, lower swivel resistance, longer continuous-duty service life, higher load density, and more stable directional behaviour. Precision bearing systems, engineered polyurethane tread materials, twin-wheel structures, compact housings, and suspension mechanisms are becoming increasingly important as mobile robots operate for longer periods and require predictable mechanical behaviour. Product development is gradually shifting away from conventional industrial caster designs toward application-specific components optimized for automated vehicle duty cycles. Manufacturers are also paying greater attention to energy efficiency because rolling resistance and swivel resistance directly affect drive-motor load and vehicle operating efficiency.

Market Dynamics

The market combines large international caster manufacturers with specialized regional suppliers. Global manufacturers generally compete through broad product portfolios, application engineering, manufacturing scale, and international customer support, while specialist companies focus on robot-specific structures, polyurethane formulation, suspension mechanisms, low-profile designs, and rapid customization. European and North American companies maintain strong positions in engineered and continuous-duty products, Japanese manufacturers emphasize precision and durability, and Chinese manufacturers increasingly combine cost-efficient production with robot-specific product development. Competition therefore depends on both manufacturing economics and application engineering rather than price alone.

Drivers

The expansion of warehouse automation, intelligent manufacturing, and flexible intralogistics is the primary demand driver. AGVs and AMRs require reliable support and balancing components capable of maintaining stable contact with industrial floors

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while allowing rapid changes in direction. Increasing adoption of mobile robots in factories and distribution facilities also expands the installed base requiring replacement wheels and complete caster assemblies. Higher vehicle payloads, longer operating hours, and greater expectations for energy efficiency further support demand for low-resistance, high-durability, and maintenance-reduced caster systems.

Restraints

Not every AGV or AMR platform requires a conventional external swivel caster. Some mobile robots use integrated drive modules, mecanum wheels, omni wheels, or chassis designs in which passive support functions are incorporated directly into proprietary wheel modules. This limits the addressable market relative to total mobile robot deployment. Product interchangeability is also restricted because payload distribution, centre of gravity, acceleration, chassis height, mounting geometry, travel speed, and floor condition vary between robot platforms. These differences increase engineering validation requirements and reduce the degree of standardization that can be achieved across customers.

Opportunities

The increasing scale of automated warehouse fleets creates opportunities for low-profile, low-resistance, and long-life caster designs that can improve operating efficiency over extended duty cycles. Suspension and shock-absorbing structures are another important opportunity because industrial floors may contain joints, thresholds, debris, or uneven surfaces that affect wheel contact and vehicle stability. Application-specific products also have potential in automotive manufacturing, pharmaceutical production, healthcare, electronics, food processing, and other environments where cleanliness, corrosion resistance, non-marking performance, electrical properties, or tightly controlled rolling behaviour are important.

Challenges

Continuous dynamic operation places demanding requirements on swivel raceways, bearings, wheel tread materials, brackets, and suspension systems. Frequent reversing and directional changes can create lateral scrub, transient resistance, and concentrated bearing loads, while floor irregularities increase impact and vibration. Manufacturers must balance durability, rolling efficiency, noise, shock absorption, floor protection, and cost within a compact mounting envelope. Another challenge is the trade-off between harder tread materials that reduce deformation and softer materials that improve cushioning, requiring system-level optimization rather than maximizing a single

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performance parameter.

Industry Chain Analysis

The upstream industry includes carbon steel, alloy steel, stainless steel, aluminum alloys, polyurethane raw materials, rubber compounds, polyamide and other engineering polymers, precision bearings, springs, fasteners, and surface-treatment materials. Midstream manufacturing involves metal stamping, machining, welding, heat treatment, plating, polyurethane casting, injection moulding, bearing installation, wheel assembly, caster assembly, and endurance testing. Product quality depends strongly on bearing precision, tread formulation, machining accuracy, swivel-system durability, and fatigue resistance. Downstream customers include AGV and AMR manufacturers, automation system integrators, warehouse operators, third-party logistics providers, automotive manufacturers, electronics producers, food and beverage companies, pharmaceutical companies, healthcare organizations, retailers, and general industrial users. Demand consists of both original equipment installation and replacement requirements generated during robot maintenance.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “AGV/AMR Swivel Caster Industry Forecast” looks at past sales and reviews total world AGV/AMR Swivel Caster sales in 2025, providing a comprehensive analysis by region and market sector of projected AGV/AMR Swivel Caster sales for 2026 through 2032. With AGV/AMR Swivel Caster sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world AGV/AMR Swivel Caster industry.

This Insight Report provides a comprehensive analysis of the global AGV/AMR Swivel Caster landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AGV/AMR Swivel Caster portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global AGV/AMR Swivel Caster market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AGV/AMR Swivel Caster and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up

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qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AGV/AMR Swivel Caster.

This report presents a comprehensive overview, market shares, and growth opportunities of AGV/AMR Swivel Caster market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Single-Wheel Swivel Caster

Twin-Wheel Swivel Caster

Three-or-More-Wheel Swivel Caster

Segmentation by Load Capacity per Caster:

Up to 200 kg

200 kg to 500 kg

500 kg to 1000 kg

More than 1000 kg

Segmentation by Wheel Diameter:

Up to 100 mm

100 mm to 150 mm

150 mm to 200 mm

More than 200 mm

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Segmentation by Wheel Tread Material:

Polyurethane Wheel

Rubber Wheel

Polyamide Wheel

Thermoplastic Elastomer Wheel

Segmentation by Application:

Autonomous Ground Vehicles

Autonomous Mobile Robots

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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Tellure R?ta S.p.A.

R?DER-VOGEL R?DER- UND ROLLENFABRIK GMBH & CO. KG

STEINCO Paul vom Stein GmbH

Vulkoprin NV

Caster Concepts, Inc.

Hamilton Caster & Mfg. Co.

Colson Group

Algood Caster Innovations

NANSIN CO., LTD.

TAKIGEN MFG CO., LTD.

HAMMER CASTER CO., LTD.

INOAC CASTER AND WHEEL CO., LTD.

JP Intelligent Technology (Huzhou) Co., Ltd.

Jiangsu SHENPAI Caster Co., Ltd.

Zhongshan Xiangrong Caster Manufacturing Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global AGV/AMR Swivel Caster market?

What factors are driving AGV/AMR Swivel Caster market growth, globally and

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by region?

Which technologies are poised for the fastest growth by market and region?

How do AGV/AMR Swivel Caster market opportunities vary by end market size?

How does AGV/AMR Swivel Caster break out by Type, by Application?

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