

# Global Direct Drive CNC Rotary Tables Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Direct Drive CNC Rotary Tables competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, global Direct Drive CNC Rotary Tables sales reached approximately 74,461 units, with an average global market price of around US\$6,135 per unit. Direct Drive CNC Rotary Table is a high-performance actuator specifically engineered for Computer Numerical Control (CNC) machine tools, integrating the advantages of Direct Drive (DD) technology with the precision of CNC systems. Its core principle is the direct coupling of a Torque Motor to the workpiece table, completely eliminating the mechanical backlash inherent in traditional worm gear or gear drives, resulting in a "zero transmission chain." This design allows the table to perform angular positioning and continuous rotation with extremely high dynamic response, acceleration, and speed, while boosting positioning accuracy and repeatability to exceptional levels (often down to a few arc-seconds). Direct Drive CNC Rotary Tables typically incorporate high-resolution encoders and powerful clamping systems, operating under high-precision closed-loop control via a CNC controller. They are widely utilized to upgrade 3-axis or 4-axis machine tools into highly efficient and accurate 5-axis simultaneous machining centers, meeting the demanding requirements for complex surface and precision component manufacturing in industries such as aerospace, automotive, and mold making. The production model for Direct Drive CNC Rotary Tables is highly focused on High-Precision, Low-Volume, Customized Integration for Order. Although core components such as torque motor stators/rotors, high-resolution encoders, and precision bearings can be standardized or procured in batches, the final product's design, assembly, and testing must strictly match the customer's specific load capacity, mounting dimensions, dynamic performance, and required precision levels on their CNC

machine tools. Consequently, leading manufacturers typically adopt an Assemble-to-Order (ATO) or Engineer-to-Order (ETO) production model. Given the product's high technical barrier, demanding manufacturing processes (including dynamic balancing, thermal stability, and ultra-precision assembly), and primary service to high-value industrial sectors like aerospace, high-end automotive, and semiconductors, the gross margin for this product is typically in a relatively high range, estimated to be around 35% to 55%, showing significantly better profitability than conventional mechanical rotary tables. Supply chain analysis reveals that the upstream segment relies on a few specialized suppliers of high-precision torque motor kits, absolute encoders, and ultra-precision bearings; the midstream consists of technology-intensive rotary table manufacturers responsible for motion system integration, drive system optimization, and control algorithm matching; and the downstream is entirely composed of CNC machine tool builders, system integrators, and end-users (such as precision component manufacturers), with demand closely tied to the capital expenditure cycles of the global high-end manufacturing industry.

#### Market Development Opportunities & Main Driving Factors

The Direct Drive CNC Rotary Table market is at the core breakout point of the industrial upgrade cycle, facing historical growth opportunities. The main driving force stems from the global high-end manufacturing sector's urgent demand for 5-axis and multi-axis simultaneous machining capabilities, particularly in the aerospace, new energy vehicle (NEV), and advanced medical device fields. National strategic investments led by governments in smart manufacturing and industrial automation are accelerating the obsolescence and upgrade of traditional machine tools. Direct Drive Rotary Tables, with their characteristics of zero backlash, high rigidity, and ultimate positioning accuracy, offer the only technological path to achieve efficient, complex surface machining. The NEV industry's surge in demand for lightweight, consolidated castings (like battery enclosures) has dramatically increased orders for high-dynamic, high-power-density direct drive tables. Concurrently, the increasing requirements for micron-level accuracy and high cleanliness motion control systems in global semiconductor equipment manufacturing ensure that the market penetration of direct drive tables, as a core component, will continue its rapid growth, offering significant value capture potential for manufacturers and investors.

#### Market Challenges, Risks, & Restraints

Despite the promising outlook, the high technological barrier and concentrated supply chain structure of the Direct Drive CNC Rotary Table market pose significant challenges and risks. The primary challenge lies in the reliance on imports for core technology and the high initial investment. The performance of these tables is constrained by key upstream components like high-precision torque motors, absolute encoders, and precision bearings, technologies often monopolized by a few international giants. This creates pressure on supply chain stability and cost control. Furthermore, while the Direct Drive technology offers overwhelming advantages in

accuracy and dynamic performance, its high initial purchase cost is a major restraint limiting widespread adoption in the mid-to-low-end CNC machine tool market. Market risks are primarily reflected in the volatility of downstream capital expenditure cycles, where adjustments in investment plans, particularly within the aerospace and automotive sectors, can lead to significant short-term fluctuations in order volume. Manufacturers must continuously allocate substantial R&D resources to overcome precision technical challenges like thermal drift and vibration control to maintain competitive superiority.

**Downstream Demand Trends** The future downstream demand for Direct Drive CNC Rotary Tables will evolve toward ?Intelligence, Flexibility, and Systemization.? In the CNC machine tool sector, the market trend will favor multi-functional, highly integrated 5-axis/multi-tasking machining centers, demanding that direct drive tables not only provide precise rotation but also feature larger through-hole designs to facilitate the passage of workpieces, cables, and coolant. In automated production lines, customers will increasingly prefer modular direct drive rotary table solutions that enable quick changeover and plug-and-play capability to enhance line flexibility and utilization. The most forward-looking trend is system intelligence: downstream users will require tables with integrated advanced sensors and Internet of Things (IIoT) interfaces to support real-time monitoring and remote diagnostics of temperature, vibration, and wear. This will enable predictive maintenance, minimizing unplanned downtime and ensuring highly reliable, efficient production in demanding manufacturing environments.

The global Direct Drive CNC Rotary Tables market size was estimated at USD 457.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 7.00% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Direct Drive CNC Rotary Tables market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Direct Drive CNC Rotary Tables market. It offers detailed profiles of major players, including

their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Direct Drive CNC Rotary Tables market.

### **Global Direct Drive CNC Rotary Tables Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

HIWIN

Fertigungstechnik Weifenfels GmbH (FTW)

Akribis Systems

peiseler GmbH & Co. KG

KML Linear Motion Technology

Fehrenbach GmbH

Standa Ltd.

NIKKEN

Jenaer Antriebstechnik GmbH (JAT)

IRTS. SL

MACCON

Motor Power Company

Peter Lehmann

SINADRIVES

Infranor Group  
YUKIWA SEIKO  
TDS Precision Products GmbH  
PI  
TSUDAKOMA  
GSA TECHNOLOGY  
Think Big Machine Tool  
Parker  
Rototrans d.o.o.  
Jingdiao Group  
CTB  
YUHUAN CNC MACHINE TOOL  
Himile  
TOPSDISK

### **Market Segmentation (by Type)**

Single-Axis Rotary Tables  
Two-Axis Rotary Tables  
Multi-axis Rotary Tables

### **Market Segmentation (by Application)**

CNC Machining and Precision Manufacturing  
Semiconductor  
Robotics and Industrial Automation  
Medical Device  
Metrology and Inspection Equipment  
Others

### **Geographic Segmentation**

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Direct Drive CNC Rotary Tables Market

Overview of the regional outlook of the Direct Drive CNC Rotary Tables Market:

### **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

### **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Direct Drive CNC Rotary Tables Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Direct Drive CNC Rotary Tables, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

## **Customization of the Report**

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## Contents

### **1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE**

- 1.1 Market Definition and Statistical Scope of Direct Drive CNC Rotary Tables
- 1.2 Key Market Segments
  - 1.2.1 Direct Drive CNC Rotary Tables Segment by Type
  - 1.2.2 Direct Drive CNC Rotary Tables Segment by Application
- 1.3 Methodology & Sources of Information
  - 1.3.1 Research Methodology
  - 1.3.2 Research Process
  - 1.3.3 Market Breakdown and Data Triangulation
  - 1.3.4 Base Year
  - 1.3.5 Report Assumptions & Caveats

### **2 DIRECT DRIVE CNC ROTARY TABLES MARKET OVERVIEW**

- 2.1 Global Market Overview
  - 2.1.1 Global Direct Drive CNC Rotary Tables Market Size (M USD) Estimates and Forecasts (2020-2035)
  - 2.1.2 Global Direct Drive CNC Rotary Tables Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

### **3 DIRECT DRIVE CNC ROTARY TABLES MARKET COMPETITIVE LANDSCAPE**

- 3.1 Company Assessment Quadrant
- 3.2 Global Direct Drive CNC Rotary Tables Product Life Cycle
- 3.3 Global Direct Drive CNC Rotary Tables Sales by Manufacturers (2020-2025)
- 3.4 Global Direct Drive CNC Rotary Tables Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Direct Drive CNC Rotary Tables Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Direct Drive CNC Rotary Tables Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 Direct Drive CNC Rotary Tables Market Competitive Situation and Trends
  - 3.8.1 Direct Drive CNC Rotary Tables Market Concentration Rate

3.8.2 Global 5 and 10 Largest Direct Drive CNC Rotary Tables Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

## **4 DIRECT DRIVE CNC ROTARY TABLES INDUSTRY CHAIN ANALYSIS**

4.1 Direct Drive CNC Rotary Tables Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

## **5 THE DEVELOPMENT AND DYNAMICS OF DIRECT DRIVE CNC ROTARY TABLES MARKET**

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global Direct Drive CNC Rotary Tables Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to Direct Drive CNC Rotary Tables Market

5.7 ESG Ratings of Leading Companies

## **6 DIRECT DRIVE CNC ROTARY TABLES MARKET SEGMENTATION BY TYPE**

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Direct Drive CNC Rotary Tables Sales Market Share by Type (2020-2025)

6.3 Global Direct Drive CNC Rotary Tables Market Size by Type (2020-2025)

6.4 Global Direct Drive CNC Rotary Tables Price by Type (2020-2025)

## **7 DIRECT DRIVE CNC ROTARY TABLES MARKET SEGMENTATION BY APPLICATION**

7.1 Evaluation Matrix of Segment Market Development Potential (Application)

7.2 Global Direct Drive CNC Rotary Tables Market Sales by Application (2020-2025)

7.3 Global Direct Drive CNC Rotary Tables Market Size (M USD) by Application (2020-2025)

7.4 Global Direct Drive CNC Rotary Tables Sales Growth Rate by Application (2020-2025)

## **8 DIRECT DRIVE CNC ROTARY TABLES MARKET SALES BY REGION**

8.1 Global Direct Drive CNC Rotary Tables Sales by Region

8.1.1 Global Direct Drive CNC Rotary Tables Sales by Region

8.1.2 Global Direct Drive CNC Rotary Tables Sales Market Share by Region

8.2 Global Direct Drive CNC Rotary Tables Market Size by Region

8.2.1 Global Direct Drive CNC Rotary Tables Market Size by Region

8.2.2 Global Direct Drive CNC Rotary Tables Market Size by Region

8.3 North America

8.3.1 North America Direct Drive CNC Rotary Tables Sales by Country

8.3.2 North America Direct Drive CNC Rotary Tables Market Size by Country

8.3.3 U.S. Market Overview

8.3.4 Canada Market Overview

8.3.5 Mexico Market Overview

8.4 Europe

8.4.1 Europe Direct Drive CNC Rotary Tables Sales by Country

8.4.2 Europe Direct Drive CNC Rotary Tables Market Size by Country

8.4.3 Germany Market Overview

8.4.4 France Market Overview

8.4.5 U.K. Market Overview

8.4.6 Italy Market Overview

8.4.7 Spain Market Overview

8.5 Asia Pacific

8.5.1 Asia Pacific Direct Drive CNC Rotary Tables Sales by Region

8.5.2 Asia Pacific Direct Drive CNC Rotary Tables Market Size by Region

8.5.3 China Market Overview

8.5.4 Japan Market Overview

- 8.5.5 South Korea Market Overview
- 8.5.6 India Market Overview
- 8.5.7 Southeast Asia Market Overview
- 8.6 South America
  - 8.6.1 South America Direct Drive CNC Rotary Tables Sales by Country
  - 8.6.2 South America Direct Drive CNC Rotary Tables Market Size by Country
  - 8.6.3 Brazil Market Overview
  - 8.6.4 Argentina Market Overview
  - 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
  - 8.7.1 Middle East and Africa Direct Drive CNC Rotary Tables Sales by Region
  - 8.7.2 Middle East and Africa Direct Drive CNC Rotary Tables Market Size by Region
  - 8.7.3 Saudi Arabia Market Overview
  - 8.7.4 UAE Market Overview
  - 8.7.5 Egypt Market Overview
  - 8.7.6 Nigeria Market Overview
  - 8.7.7 South Africa Market Overview

## **9 DIRECT DRIVE CNC ROTARY TABLES MARKET PRODUCTION BY REGION**

- 9.1 Global Production of Direct Drive CNC Rotary Tables by Region(2020-2025)
- 9.2 Global Direct Drive CNC Rotary Tables Revenue Market Share by Region (2020-2025)
- 9.3 Global Direct Drive CNC Rotary Tables Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Direct Drive CNC Rotary Tables Production
  - 9.4.1 North America Direct Drive CNC Rotary Tables Production Growth Rate (2020-2025)
  - 9.4.2 North America Direct Drive CNC Rotary Tables Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Direct Drive CNC Rotary Tables Production
  - 9.5.1 Europe Direct Drive CNC Rotary Tables Production Growth Rate (2020-2025)
  - 9.5.2 Europe Direct Drive CNC Rotary Tables Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Direct Drive CNC Rotary Tables Production (2020-2025)
  - 9.6.1 Japan Direct Drive CNC Rotary Tables Production Growth Rate (2020-2025)
  - 9.6.2 Japan Direct Drive CNC Rotary Tables Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China Direct Drive CNC Rotary Tables Production (2020-2025)

- 9.7.1 China Direct Drive CNC Rotary Tables Production Growth Rate (2020-2025)
- 9.7.2 China Direct Drive CNC Rotary Tables Production, Revenue, Price and Gross Margin (2020-2025)

## **10 KEY COMPANIES PROFILE**

### **10.1 HIWIN**

- 10.1.1 HIWIN Basic Information
- 10.1.2 HIWIN Direct Drive CNC Rotary Tables Product Overview
- 10.1.3 HIWIN Direct Drive CNC Rotary Tables Product Market Performance
- 10.1.4 HIWIN Business Overview
- 10.1.5 HIWIN SWOT Analysis
- 10.1.6 HIWIN Recent Developments

### **10.2 Fertigungstechnik Weißenfels GmbH (FTW)**

- 10.2.1 Fertigungstechnik Weißenfels GmbH (FTW) Basic Information
- 10.2.2 Fertigungstechnik Weißenfels GmbH (FTW) Direct Drive CNC Rotary Tables Product Overview
- 10.2.3 Fertigungstechnik Weißenfels GmbH (FTW) Direct Drive CNC Rotary Tables Product Market Performance
- 10.2.4 Fertigungstechnik Weißenfels GmbH (FTW) Business Overview
- 10.2.5 Fertigungstechnik Weißenfels GmbH (FTW) SWOT Analysis
- 10.2.6 Fertigungstechnik Weißenfels GmbH (FTW) Recent Developments

### **10.3 Akribis Systems**

- 10.3.1 Akribis Systems Basic Information
- 10.3.2 Akribis Systems Direct Drive CNC Rotary Tables Product Overview
- 10.3.3 Akribis Systems Direct Drive CNC Rotary Tables Product Market Performance
- 10.3.4 Akribis Systems Business Overview
- 10.3.5 Akribis Systems SWOT Analysis
- 10.3.6 Akribis Systems Recent Developments

### **10.4 peiseler GmbH and Co. KG**

- 10.4.1 peiseler GmbH and Co. KG Basic Information
- 10.4.2 peiseler GmbH and Co. KG Direct Drive CNC Rotary Tables Product Overview
- 10.4.3 peiseler GmbH and Co. KG Direct Drive CNC Rotary Tables Product Market Performance
- 10.4.4 peiseler GmbH and Co. KG Business Overview
- 10.4.5 peiseler GmbH and Co. KG Recent Developments

### **10.5 KML Linear Motion Technology**

- 10.5.1 KML Linear Motion Technology Basic Information
- 10.5.2 KML Linear Motion Technology Direct Drive CNC Rotary Tables Product

## Overview

10.5.3 KML Linear Motion Technology Direct Drive CNC Rotary Tables Product Market

## Performance

10.5.4 KML Linear Motion Technology Business Overview

10.5.5 KML Linear Motion Technology Recent Developments

## 10.6 F?hrenbach GmbH

10.6.1 F?hrenbach GmbH Basic Information

10.6.2 F?hrenbach GmbH Direct Drive CNC Rotary Tables Product Overview

10.6.3 F?hrenbach GmbH Direct Drive CNC Rotary Tables Product Market

## Performance

10.6.4 F?hrenbach GmbH Business Overview

10.6.5 F?hrenbach GmbH Recent Developments

## 10.7 Standa Ltd.

10.7.1 Standa Ltd. Basic Information

10.7.2 Standa Ltd. Direct Drive CNC Rotary Tables Product Overview

10.7.3 Standa Ltd. Direct Drive CNC Rotary Tables Product Market Performance

10.7.4 Standa Ltd. Business Overview

10.7.5 Standa Ltd. Recent Developments

## 10.8 NIKKEN

10.8.1 NIKKEN Basic Information

10.8.2 NIKKEN Direct Drive CNC Rotary Tables Product Overview

10.8.3 NIKKEN Direct Drive CNC Rotary Tables Product Market Performance

10.8.4 NIKKEN Business Overview

10.8.5 NIKKEN Recent Developments

## 10.9 Jenaer Antriebstechnik GmbH (JAT)

10.9.1 Jenaer Antriebstechnik GmbH (JAT) Basic Information

10.9.2 Jenaer Antriebstechnik GmbH (JAT) Direct Drive CNC Rotary Tables Product

## Overview

10.9.3 Jenaer Antriebstechnik GmbH (JAT) Direct Drive CNC Rotary Tables Product

## Market Performance

10.9.4 Jenaer Antriebstechnik GmbH (JAT) Business Overview

10.9.5 Jenaer Antriebstechnik GmbH (JAT) Recent Developments

## 10.10 IRTS. SL

10.10.1 IRTS. SL Basic Information

10.10.2 IRTS. SL Direct Drive CNC Rotary Tables Product Overview

10.10.3 IRTS. SL Direct Drive CNC Rotary Tables Product Market Performance

10.10.4 IRTS. SL Business Overview

10.10.5 IRTS. SL Recent Developments

## 10.11 MACCON

- 10.11.1 MACCON Basic Information
- 10.11.2 MACCON Direct Drive CNC Rotary Tables Product Overview
- 10.11.3 MACCON Direct Drive CNC Rotary Tables Product Market Performance
- 10.11.4 MACCON Business Overview
- 10.11.5 MACCON Recent Developments
- 10.12 Motor Power Company
  - 10.12.1 Motor Power Company Basic Information
  - 10.12.2 Motor Power Company Direct Drive CNC Rotary Tables Product Overview
  - 10.12.3 Motor Power Company Direct Drive CNC Rotary Tables Product Market Performance
  - 10.12.4 Motor Power Company Business Overview
  - 10.12.5 Motor Power Company Recent Developments
- 10.13 Peter Lehmann
  - 10.13.1 Peter Lehmann Basic Information
  - 10.13.2 Peter Lehmann Direct Drive CNC Rotary Tables Product Overview
  - 10.13.3 Peter Lehmann Direct Drive CNC Rotary Tables Product Market Performance
  - 10.13.4 Peter Lehmann Business Overview
  - 10.13.5 Peter Lehmann Recent Developments
- 10.14 SINADRIVES
  - 10.14.1 SINADRIVES Basic Information
  - 10.14.2 SINADRIVES Direct Drive CNC Rotary Tables Product Overview
  - 10.14.3 SINADRIVES Direct Drive CNC Rotary Tables Product Market Performance
  - 10.14.4 SINADRIVES Business Overview
  - 10.14.5 SINADRIVES Recent Developments
- 10.15 Infranor Group
  - 10.15.1 Infranor Group Basic Information
  - 10.15.2 Infranor Group Direct Drive CNC Rotary Tables Product Overview
  - 10.15.3 Infranor Group Direct Drive CNC Rotary Tables Product Market Performance
  - 10.15.4 Infranor Group Business Overview
  - 10.15.5 Infranor Group Recent Developments
- 10.16 YUKIWA SEIKO
  - 10.16.1 YUKIWA SEIKO Basic Information
  - 10.16.2 YUKIWA SEIKO Direct Drive CNC Rotary Tables Product Overview
  - 10.16.3 YUKIWA SEIKO Direct Drive CNC Rotary Tables Product Market Performance
  - 10.16.4 YUKIWA SEIKO Business Overview
  - 10.16.5 YUKIWA SEIKO Recent Developments
- 10.17 TDS Precision Products GmbH
  - 10.17.1 TDS Precision Products GmbH Basic Information
  - 10.17.2 TDS Precision Products GmbH Direct Drive CNC Rotary Tables Product

## Overview

10.17.3 TDS Precision Products GmbH Direct Drive CNC Rotary Tables Product

## Market Performance

10.17.4 TDS Precision Products GmbH Business Overview

10.17.5 TDS Precision Products GmbH Recent Developments

## 10.18 PI

10.18.1 PI Basic Information

10.18.2 PI Direct Drive CNC Rotary Tables Product Overview

10.18.3 PI Direct Drive CNC Rotary Tables Product Market Performance

10.18.4 PI Business Overview

10.18.5 PI Recent Developments

## 10.19 TSUDAKOMA

10.19.1 TSUDAKOMA Basic Information

10.19.2 TSUDAKOMA Direct Drive CNC Rotary Tables Product Overview

10.19.3 TSUDAKOMA Direct Drive CNC Rotary Tables Product Market Performance

10.19.4 TSUDAKOMA Business Overview

10.19.5 TSUDAKOMA Recent Developments

## 10.20 GSA TECHNOLOGY

10.20.1 GSA TECHNOLOGY Basic Information

10.20.2 GSA TECHNOLOGY Direct Drive CNC Rotary Tables Product Overview

10.20.3 GSA TECHNOLOGY Direct Drive CNC Rotary Tables Product Market

## Performance

10.20.4 GSA TECHNOLOGY Business Overview

10.20.5 GSA TECHNOLOGY Recent Developments

## 10.21 Think Big Machine Tool

10.21.1 Think Big Machine Tool Basic Information

10.21.2 Think Big Machine Tool Direct Drive CNC Rotary Tables Product Overview

10.21.3 Think Big Machine Tool Direct Drive CNC Rotary Tables Product Market

## Performance

10.21.4 Think Big Machine Tool Business Overview

10.21.5 Think Big Machine Tool Recent Developments

## 10.22 Parker

10.22.1 Parker Basic Information

10.22.2 Parker Direct Drive CNC Rotary Tables Product Overview

10.22.3 Parker Direct Drive CNC Rotary Tables Product Market Performance

10.22.4 Parker Business Overview

10.22.5 Parker Recent Developments

## 10.23 Rototrans d.o.o.

10.23.1 Rototrans d.o.o. Basic Information

- 10.23.2 Rototrans d.o.o. Direct Drive CNC Rotary Tables Product Overview
- 10.23.3 Rototrans d.o.o. Direct Drive CNC Rotary Tables Product Market Performance
- 10.23.4 Rototrans d.o.o. Business Overview
- 10.23.5 Rototrans d.o.o. Recent Developments
- 10.24 Jingdiao Group
  - 10.24.1 Jingdiao Group Basic Information
  - 10.24.2 Jingdiao Group Direct Drive CNC Rotary Tables Product Overview
  - 10.24.3 Jingdiao Group Direct Drive CNC Rotary Tables Product Market Performance
  - 10.24.4 Jingdiao Group Business Overview
  - 10.24.5 Jingdiao Group Recent Developments
- 10.25 CTB
  - 10.25.1 CTB Basic Information
  - 10.25.2 CTB Direct Drive CNC Rotary Tables Product Overview
  - 10.25.3 CTB Direct Drive CNC Rotary Tables Product Market Performance
  - 10.25.4 CTB Business Overview
  - 10.25.5 CTB Recent Developments
- 10.26 YUHUAN CNC MACHINE TOOL
  - 10.26.1 YUHUAN CNC MACHINE TOOL Basic Information
  - 10.26.2 YUHUAN CNC MACHINE TOOL Direct Drive CNC Rotary Tables Product Overview
  - 10.26.3 YUHUAN CNC MACHINE TOOL Direct Drive CNC Rotary Tables Product Market Performance
  - 10.26.4 YUHUAN CNC MACHINE TOOL Business Overview
  - 10.26.5 YUHUAN CNC MACHINE TOOL Recent Developments
- 10.27 Himile
  - 10.27.1 Himile Basic Information
  - 10.27.2 Himile Direct Drive CNC Rotary Tables Product Overview
  - 10.27.3 Himile Direct Drive CNC Rotary Tables Product Market Performance
  - 10.27.4 Himile Business Overview
  - 10.27.5 Himile Recent Developments
- 10.28 TOPSDISK
  - 10.28.1 TOPSDISK Basic Information
  - 10.28.2 TOPSDISK Direct Drive CNC Rotary Tables Product Overview
  - 10.28.3 TOPSDISK Direct Drive CNC Rotary Tables Product Market Performance
  - 10.28.4 TOPSDISK Business Overview
  - 10.28.5 TOPSDISK Recent Developments

## **11 DIRECT DRIVE CNC ROTARY TABLES MARKET FORECAST BY REGION**

11.1 Global Direct Drive CNC Rotary Tables Market Size Forecast

11.2 Global Direct Drive CNC Rotary Tables Market Forecast by Region

11.2.1 North America Market Size Forecast by Country

11.2.2 Europe Direct Drive CNC Rotary Tables Market Size Forecast by Country

11.2.3 Asia Pacific Direct Drive CNC Rotary Tables Market Size Forecast by Region

11.2.4 South America Direct Drive CNC Rotary Tables Market Size Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of Direct Drive CNC Rotary Tables by Country

## **12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)**

12.1 Global Direct Drive CNC Rotary Tables Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of Direct Drive CNC Rotary Tables by Type (2026-2035)

12.1.2 Global Direct Drive CNC Rotary Tables Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of Direct Drive CNC Rotary Tables by Type (2026-2035)

12.2 Global Direct Drive CNC Rotary Tables Market Forecast by Application (2026-2035)

12.2.1 Global Direct Drive CNC Rotary Tables Sales (K Units) Forecast by Application

12.2.2 Global Direct Drive CNC Rotary Tables Market Size (M USD) Forecast by Application (2026-2035)

## **13 CONCLUSION AND KEY FINDINGS**

## List Of Tables

### LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Direct Drive CNC Rotary Tables Market Size by Type (M USD)

Table 4. Global Direct Drive CNC Rotary Tables Market Size by Application

Table 5. Direct Drive CNC Rotary Tables Market Size Comparison by Region (M USD)

Table 6. Global Direct Drive CNC Rotary Tables Sales (K Units) by Manufacturers (2020-2025)

Table 7. Global Direct Drive CNC Rotary Tables Sales Market Share by Manufacturers (2020-2025)

Table 8. Global Direct Drive CNC Rotary Tables Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global Direct Drive CNC Rotary Tables Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Direct Drive CNC Rotary Tables as of 2025)

Table 11. Global Market Direct Drive CNC Rotary Tables Average Price (USD/Unit) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Direct Drive CNC Rotary Tables Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. Direct Drive CNC Rotary Tables Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 26. Global Direct Drive CNC Rotary Tables Sales by Type (K Units)

Table 27. Global Direct Drive CNC Rotary Tables Market Size by Type (M USD)

- Table 28. Global Direct Drive CNC Rotary Tables Sales (K Units) by Type (2020-2025)
- Table 29. Global Direct Drive CNC Rotary Tables Sales Market Share by Type (2020-2025)
- Table 30. Global Direct Drive CNC Rotary Tables Market Size (M USD) by Type (2020-2025)
- Table 31. Global Direct Drive CNC Rotary Tables Market Share by Type (2020-2025)
- Table 32. Global Direct Drive CNC Rotary Tables Price (USD/Unit) by Type (2020-2025)
- Table 33. Global Direct Drive CNC Rotary Tables Sales (K Units) by Application
- Table 34. Global Direct Drive CNC Rotary Tables Market Size by Application
- Table 35. Global Direct Drive CNC Rotary Tables Sales by Application (2020-2025) & (K Units)
- Table 36. Global Direct Drive CNC Rotary Tables Sales Market Share by Application (2020-2025)
- Table 37. Global Direct Drive CNC Rotary Tables Market Size by Application (2020-2025) & (M USD)
- Table 38. Global Direct Drive CNC Rotary Tables Market Share by Application (2020-2025)
- Table 39. Global Direct Drive CNC Rotary Tables Sales Growth Rate by Application (2020-2025)
- Table 40. Global Direct Drive CNC Rotary Tables Sales by Region (2020-2025) & (K Units)
- Table 41. Global Direct Drive CNC Rotary Tables Sales Market Share by Region (2020-2025)
- Table 42. Global Direct Drive CNC Rotary Tables Market Size by Region (2020-2025) & (M USD)
- Table 43. Global Direct Drive CNC Rotary Tables Market Size by Region (2020-2025)
- Table 44. North America Direct Drive CNC Rotary Tables Sales by Country (2020-2025) & (K Units)
- Table 45. North America Direct Drive CNC Rotary Tables Market Size by Country (2020-2025) & (M USD)
- Table 46. Europe Direct Drive CNC Rotary Tables Sales by Country (2020-2025) & (K Units)
- Table 47. Europe Direct Drive CNC Rotary Tables Market Size by Country (2020-2025) & (M USD)
- Table 48. Asia Pacific Direct Drive CNC Rotary Tables Sales by Region (2020-2025) & (K Units)
- Table 49. Asia Pacific Direct Drive CNC Rotary Tables Market Size by Region (2020-2025) & (M USD)

- Table 50. South America Direct Drive CNC Rotary Tables Sales by Country (2020-2025) & (K Units)
- Table 51. South America Direct Drive CNC Rotary Tables Market Size by Country (2020-2025) & (M USD)
- Table 52. Middle East and Africa Direct Drive CNC Rotary Tables Sales by Region (2020-2025) & (K Units)
- Table 53. Middle East and Africa Direct Drive CNC Rotary Tables Market Size by Region (2020-2025) & (M USD)
- Table 54. Global Direct Drive CNC Rotary Tables Production (K Units) by Region(2020-2025)
- Table 55. Global Direct Drive CNC Rotary Tables Revenue (US\$ Million) by Region (2020-2025)
- Table 56. Global Direct Drive CNC Rotary Tables Revenue Market Share by Region (2020-2025)
- Table 57. Global Direct Drive CNC Rotary Tables Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 58. North America Direct Drive CNC Rotary Tables Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 59. Europe Direct Drive CNC Rotary Tables Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 60. Japan Direct Drive CNC Rotary Tables Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 61. China Direct Drive CNC Rotary Tables Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 62. HIWIN Basic Information
- Table 63. HIWIN Direct Drive CNC Rotary Tables Product Overview
- Table 64. HIWIN Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 65. HIWIN Business Overview
- Table 66. HIWIN SWOT Analysis
- Table 67. HIWIN Recent Developments
- Table 68. Fertigungstechnik Wei?enfels GmbH (FTW) Basic Information
- Table 69. Fertigungstechnik Wei?enfels GmbH (FTW) Direct Drive CNC Rotary Tables Product Overview
- Table 70. Fertigungstechnik Wei?enfels GmbH (FTW) Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 71. Fertigungstechnik Wei?enfels GmbH (FTW) Business Overview
- Table 72. Fertigungstechnik Wei?enfels GmbH (FTW) SWOT Analysis
- Table 73. Fertigungstechnik Wei?enfels GmbH (FTW) Recent Developments

- Table 74. Akribis Systems Basic Information
- Table 75. Akribis Systems Direct Drive CNC Rotary Tables Product Overview
- Table 76. Akribis Systems Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 77. Akribis Systems Business Overview
- Table 78. Akribis Systems SWOT Analysis
- Table 79. Akribis Systems Recent Developments
- Table 80. peiseler GmbH and Co. KG Basic Information
- Table 81. peiseler GmbH and Co. KG Direct Drive CNC Rotary Tables Product Overview
- Table 82. peiseler GmbH and Co. KG Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 83. peiseler GmbH and Co. KG Business Overview
- Table 84. peiseler GmbH and Co. KG Recent Developments
- Table 85. KML Linear Motion Technology Basic Information
- Table 86. KML Linear Motion Technology Direct Drive CNC Rotary Tables Product Overview
- Table 87. KML Linear Motion Technology Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 88. KML Linear Motion Technology Business Overview
- Table 89. KML Linear Motion Technology Recent Developments
- Table 90. F?hrenbach GmbH Basic Information
- Table 91. F?hrenbach GmbH Direct Drive CNC Rotary Tables Product Overview
- Table 92. F?hrenbach GmbH Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 93. F?hrenbach GmbH Business Overview
- Table 94. F?hrenbach GmbH Recent Developments
- Table 95. Standa Ltd. Basic Information
- Table 96. Standa Ltd. Direct Drive CNC Rotary Tables Product Overview
- Table 97. Standa Ltd. Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 98. Standa Ltd. Business Overview
- Table 99. Standa Ltd. Recent Developments
- Table 100. NIKKEN Basic Information
- Table 101. NIKKEN Direct Drive CNC Rotary Tables Product Overview
- Table 102. NIKKEN Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 103. NIKKEN Business Overview
- Table 104. NIKKEN Recent Developments

Table 105. Jenaer Antriebstechnik GmbH (JAT) Basic Information

Table 106. Jenaer Antriebstechnik GmbH (JAT) Direct Drive CNC Rotary Tables Product Overview

Table 107. Jenaer Antriebstechnik GmbH (JAT) Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 108. Jenaer Antriebstechnik GmbH (JAT) Business Overview

Table 109. Jenaer Antriebstechnik GmbH (JAT) Recent Developments

Table 110. IRTS. SL Basic Information

Table 111. IRTS. SL Direct Drive CNC Rotary Tables Product Overview

Table 112. IRTS. SL Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 113. IRTS. SL Business Overview

Table 114. IRTS. SL Recent Developments

Table 115. MACCON Basic Information

Table 116. MACCON Direct Drive CNC Rotary Tables Product Overview

Table 117. MACCON Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 118. MACCON Business Overview

Table 119. MACCON Recent Developments

Table 120. Motor Power Company Basic Information

Table 121. Motor Power Company Direct Drive CNC Rotary Tables Product Overview

Table 122. Motor Power Company Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 123. Motor Power Company Business Overview

Table 124. Motor Power Company Recent Developments

Table 125. Peter Lehmann Basic Information

Table 126. Peter Lehmann Direct Drive CNC Rotary Tables Product Overview

Table 127. Peter Lehmann Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 128. Peter Lehmann Business Overview

Table 129. Peter Lehmann Recent Developments

Table 130. SINADRIVES Basic Information

Table 131. SINADRIVES Direct Drive CNC Rotary Tables Product Overview

Table 132. SINADRIVES Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 133. SINADRIVES Business Overview

Table 134. SINADRIVES Recent Developments

Table 135. Infranor Group Basic Information

Table 136. Infranor Group Direct Drive CNC Rotary Tables Product Overview

- Table 137. Infranor Group Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 138. Infranor Group Business Overview
- Table 139. Infranor Group Recent Developments
- Table 140. YUKIWA SEIKO Basic Information
- Table 141. YUKIWA SEIKO Direct Drive CNC Rotary Tables Product Overview
- Table 142. YUKIWA SEIKO Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 143. YUKIWA SEIKO Business Overview
- Table 144. YUKIWA SEIKO Recent Developments
- Table 145. TDS Precision Products GmbH Basic Information
- Table 146. TDS Precision Products GmbH Direct Drive CNC Rotary Tables Product Overview
- Table 147. TDS Precision Products GmbH Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 148. TDS Precision Products GmbH Business Overview
- Table 149. TDS Precision Products GmbH Recent Developments
- Table 150. PI Basic Information
- Table 151. PI Direct Drive CNC Rotary Tables Product Overview
- Table 152. PI Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 153. PI Business Overview
- Table 154. PI Recent Developments
- Table 155. TSUDAKOMA Basic Information
- Table 156. TSUDAKOMA Direct Drive CNC Rotary Tables Product Overview
- Table 157. TSUDAKOMA Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 158. TSUDAKOMA Business Overview
- Table 159. TSUDAKOMA Recent Developments
- Table 160. GSA TECHNOLOGY Basic Information
- Table 161. GSA TECHNOLOGY Direct Drive CNC Rotary Tables Product Overview
- Table 162. GSA TECHNOLOGY Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 163. GSA TECHNOLOGY Business Overview
- Table 164. GSA TECHNOLOGY Recent Developments
- Table 165. Think Big Machine Tool Basic Information
- Table 166. Think Big Machine Tool Direct Drive CNC Rotary Tables Product Overview
- Table 167. Think Big Machine Tool Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

- Table 168. Think Big Machine Tool Business Overview
- Table 169. Think Big Machine Tool Recent Developments
- Table 170. Parker Basic Information
- Table 171. Parker Direct Drive CNC Rotary Tables Product Overview
- Table 172. Parker Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 173. Parker Business Overview
- Table 174. Parker Recent Developments
- Table 175. Rototrans d.o.o. Basic Information
- Table 176. Rototrans d.o.o. Direct Drive CNC Rotary Tables Product Overview
- Table 177. Rototrans d.o.o. Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 178. Rototrans d.o.o. Business Overview
- Table 179. Rototrans d.o.o. Recent Developments
- Table 180. Jingdiao Group Basic Information
- Table 181. Jingdiao Group Direct Drive CNC Rotary Tables Product Overview
- Table 182. Jingdiao Group Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 183. Jingdiao Group Business Overview
- Table 184. Jingdiao Group Recent Developments
- Table 185. CTB Basic Information
- Table 186. CTB Direct Drive CNC Rotary Tables Product Overview
- Table 187. CTB Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 188. CTB Business Overview
- Table 189. CTB Recent Developments
- Table 190. YUHUAN CNC MACHINE TOOL Basic Information
- Table 191. YUHUAN CNC MACHINE TOOL Direct Drive CNC Rotary Tables Product Overview
- Table 192. YUHUAN CNC MACHINE TOOL Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 193. YUHUAN CNC MACHINE TOOL Business Overview
- Table 194. YUHUAN CNC MACHINE TOOL Recent Developments
- Table 195. Himile Basic Information
- Table 196. Himile Direct Drive CNC Rotary Tables Product Overview
- Table 197. Himile Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 198. Himile Business Overview
- Table 199. Himile Recent Developments

- Table 200. TOPSDISK Basic Information
- Table 201. TOPSDISK Direct Drive CNC Rotary Tables Product Overview
- Table 202. TOPSDISK Direct Drive CNC Rotary Tables Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 203. TOPSDISK Business Overview
- Table 204. TOPSDISK Recent Developments
- Table 205. Global Direct Drive CNC Rotary Tables Sales Forecast by Region (2026-2035) & (K Units)
- Table 206. Global Direct Drive CNC Rotary Tables Market Size Forecast by Region (2026-2035) & (M USD)
- Table 207. North America Direct Drive CNC Rotary Tables Sales Forecast by Country (2026-2035) & (K Units)
- Table 208. North America Direct Drive CNC Rotary Tables Market Size Forecast by Country (2026-2035) & (M USD)
- Table 209. Europe Direct Drive CNC Rotary Tables Sales Forecast by Country (2026-2035) & (K Units)
- Table 210. Europe Direct Drive CNC Rotary Tables Market Size Forecast by Country (2026-2035) & (M USD)
- Table 211. Asia Pacific Direct Drive CNC Rotary Tables Sales Forecast by Region (2026-2035) & (K Units)
- Table 212. Asia Pacific Direct Drive CNC Rotary Tables Market Size Forecast by Region (2026-2035) & (M USD)
- Table 213. South America Direct Drive CNC Rotary Tables Sales Forecast by Country (2026-2035) & (K Units)
- Table 214. South America Direct Drive CNC Rotary Tables Market Size Forecast by Country (2026-2035) & (M USD)
- Table 215. Middle East and Africa Direct Drive CNC Rotary Tables Sales Forecast by Country (2026-2035) & (Units)
- Table 216. Middle East and Africa Direct Drive CNC Rotary Tables Market Size Forecast by Country (2026-2035) & (M USD)
- Table 217. Global Direct Drive CNC Rotary Tables Sales Forecast by Type (2026-2035) & (K Units)
- Table 218. Global Direct Drive CNC Rotary Tables Market Size Forecast by Type (2026-2035) & (M USD)
- Table 219. Global Direct Drive CNC Rotary Tables Price Forecast by Type (2026-2035) & (USD/Unit)
- Table 220. Global Direct Drive CNC Rotary Tables Sales (K Units) Forecast by Application (2026-2035)
- Table 221. Global Direct Drive CNC Rotary Tables Market Size Forecast by Application

(2026-2035) & (M USD)

## List Of Figures

### LIST OF FIGURES

- Figure 1. Product Picture of Direct Drive CNC Rotary Tables
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Direct Drive CNC Rotary Tables Market Size (M USD), 2025-2035
- Figure 5. Global Direct Drive CNC Rotary Tables Market Size (M USD) (2020-2035)
- Figure 6. Global Direct Drive CNC Rotary Tables Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Direct Drive CNC Rotary Tables Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Direct Drive CNC Rotary Tables Product Life Cycle
- Figure 13. Direct Drive CNC Rotary Tables Sales Share by Manufacturers in 2025
- Figure 14. Global Direct Drive CNC Rotary Tables Revenue Share by Manufacturers in 2025
- Figure 15. Direct Drive CNC Rotary Tables Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Direct Drive CNC Rotary Tables Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Direct Drive CNC Rotary Tables Revenue in 2025
- Figure 18. Industry Chain Map of Direct Drive CNC Rotary Tables
- Figure 19. Global Direct Drive CNC Rotary Tables Market PEST Analysis
- Figure 20. Global Direct Drive CNC Rotary Tables Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Direct Drive CNC Rotary Tables Market Share by Type
- Figure 27. Sales Market Share of Direct Drive CNC Rotary Tables by Type (2020-2025)
- Figure 28. Sales Market Share of Direct Drive CNC Rotary Tables by Type in 2025
- Figure 29. Market Share of Direct Drive CNC Rotary Tables by Type (2020-2025)
- Figure 30. Market Share of Direct Drive CNC Rotary Tables by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

- Figure 32. Global Direct Drive CNC Rotary Tables Market Share by Application
- Figure 33. Global Direct Drive CNC Rotary Tables Sales Market Share by Application (2020-2025)
- Figure 34. Global Direct Drive CNC Rotary Tables Sales Market Share by Application in 2025
- Figure 35. Global Direct Drive CNC Rotary Tables Market Share by Application (2020-2025)
- Figure 36. Global Direct Drive CNC Rotary Tables Market Share by Application in 2025
- Figure 37. Global Direct Drive CNC Rotary Tables Sales Growth Rate by Application (2020-2025)
- Figure 38. Global Direct Drive CNC Rotary Tables Sales Market Share by Region (2020-2025)
- Figure 39. Global Direct Drive CNC Rotary Tables Market Size by Region (2020-2025)
- Figure 40. North America Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)
- Figure 41. North America Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)
- Figure 42. North America Direct Drive CNC Rotary Tables Sales Market Share by Country in 2024
- Figure 43. North America Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America Direct Drive CNC Rotary Tables Market Size by Country in 2024
- Figure 45. U.S. Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)
- Figure 46. U.S. Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada Direct Drive CNC Rotary Tables Sales (K Units) and Growth Rate (2020-2025)
- Figure 48. Canada Direct Drive CNC Rotary Tables Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico Direct Drive CNC Rotary Tables Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico Direct Drive CNC Rotary Tables Market Size (Units) and Growth Rate (2020-2025)
- Figure 51. Europe Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)
- Figure 52. Europe Direct Drive CNC Rotary Tables Sales Market Share by Country in 2024

Figure 53. Europe Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Direct Drive CNC Rotary Tables Market Size by Country in 2024

Figure 55. Germany Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Direct Drive CNC Rotary Tables Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Direct Drive CNC Rotary Tables Sales Market Share by Region in 2024

Figure 67. Asia Pacific Direct Drive CNC Rotary Tables Market Size by Region in 2024

Figure 68. China Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Direct Drive CNC Rotary Tables Market Size and Growth Rate

(2020-2025) & (M USD)

Figure 74. India Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Direct Drive CNC Rotary Tables Sales and Growth Rate (K Units)

Figure 79. South America Direct Drive CNC Rotary Tables Sales Market Share by Country in 2024

Figure 80. South America Direct Drive CNC Rotary Tables Market Size and Growth Rate (M USD)

Figure 81. South America Direct Drive CNC Rotary Tables Market Size by Country in 2024

Figure 82. Brazil Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

Figure 87. Columbia Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Direct Drive CNC Rotary Tables Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa Direct Drive CNC Rotary Tables Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Direct Drive CNC Rotary Tables Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Direct Drive CNC Rotary Tables Market Size by Region in 2024

Figure 92. Saudi Arabia Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)

- Figure 93. Saudi Arabia Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 94. UAE Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)
- Figure 95. UAE Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 96. Egypt Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)
- Figure 97. Egypt Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 98. Nigeria Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)
- Figure 99. Nigeria Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 100. South Africa Direct Drive CNC Rotary Tables Sales and Growth Rate (2020-2025) & (K Units)
- Figure 101. South Africa Direct Drive CNC Rotary Tables Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 102. Global Direct Drive CNC Rotary Tables Production Market Share by Region (2020-2025)
- Figure 103. North America Direct Drive CNC Rotary Tables Production (K Units) Growth Rate (2020-2025)
- Figure 104. Europe Direct Drive CNC Rotary Tables Production (K Units) Growth Rate (2020-2025)
- Figure 105. Japan Direct Drive CNC Rotary Tables Production (K Units) Growth Rate (2020-2025)
- Figure 106. China Direct Drive CNC Rotary Tables Production (K Units) Growth Rate (2020-2025)
- Figure 107. Global Direct Drive CNC Rotary Tables Sales Forecast by Volume (2020-2035) & (K Units)
- Figure 108. Global Direct Drive CNC Rotary Tables Market Size Forecast by Value (2020-2035) & (M USD)
- Figure 109. Global Direct Drive CNC Rotary Tables Sales Market Share Forecast by Type (2026-2035)
- Figure 110. Global Direct Drive CNC Rotary Tables Market Share Forecast by Type (2026-2035)
- Figure 111. Global Direct Drive CNC Rotary Tables Sales Forecast by Application (2026-2035)
- Figure 112. Global Direct Drive CNC Rotary Tables Market Share Forecast by

Application (2026-2035)

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