

# Global Toroid Shaped Frameless Torque Motor 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 Toroid Shaped Frameless Torque Motor competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, the global average price of a toroidal-shaped frameless torque motor (TFM) was \$2000, with annual sales of approximately 420,000 units. This type of motor is a direct-drive torque motor that utilizes a toroidal coil and radially distributed permanent magnet structure. Eliminating the traditional frame structure with a base and bearing supports, it is integrated directly into the user's mechanical system, offering high torque density, zero transmission backlash, extremely low moment of inertia, and high dynamic response. Its toroidal structure ensures a large hollow channel while also achieving greater torque uniformity and low cogging. It is ideally suited for applications requiring high-precision positioning and smooth torque output, such as satellite attitude control systems, aerospace servos, semiconductor wafer handling, medical imaging equipment, and advanced robotic joints. With increasing demand for high-performance direct-drive technology in precision equipment, aerospace exploration, and the new energy industry, TFMs are becoming a key growth area in the drive sector.

**Product Overview** Toroid-shaped frameless torque motors are widely used in high-precision motion control applications such as collaborative robots, industrial robotic arms, aerospace actuators, medical imaging equipment, and semiconductor wafer handling platforms. Their advantages include high torque density, low cogging, and excellent dynamic response, making them particularly suitable for applications requiring high-precision positioning and smooth torque output.

**Supply Chain** Upstream raw materials include high-performance NdFeB permanent magnets, high-temperature enameled wire, laminated silicon steel sheets, ring-shaped stator laminates, resin casting materials, and high-thermal conductivity insulating adhesives. Typical downstream

equipment includes the Yushu B1 robot, Xiaomi CyberDog, UBTECH X1, and Fourier GR-1 exoskeleton robot. A quadruped robot typically uses 12-16 small-sized toroid-shaped frameless torque motors, while a collaborative robotic arm typically requires 6-7. **Manufacturer Characteristics** Among them, Kollmorgen (USA) utilizes distributed fractional slots and carbon fiber lashing technology; TQ Robodrive (Germany) employs modular stators and epoxy molding technology, emphasizing high torque and dynamic response in a compact size, and is widely used in collaborative robot joints. Aerotech focuses on ultra-high-precision platforms, using torque motors for nano-positioning and optical systems. Buke has a clear advantage in domestic substitution, offering cost-optimized motors specifically for robot joints, priced between \$200 and \$400, making it the preferred choice for domestic robot manufacturers.

**Application Ratio** Robot joint-type toroid-shaped frameless torque motors: Primarily used in collaborative robots, quadruped robots, and exoskeletons. These motors feature a large hollow bore and high torque density, facilitating cable and drive module routing. Robotic products account for approximately 65% of total sales, and are the core market source due to their low average price (US\$200-400 per unit) due to mass production.

**Industrial and semiconductor equipment types:** Used in wafer handling, precision machine tools, CNC rotary tables, etc., they emphasize high precision and low heat generation, typically with liquid or air cooling. This type of motor accounts for approximately 15% of sales, boasts a higher average price, and contributes over one-third of market revenue.

**Medical imaging and equipment motors:** Used in CT scanner turntables, MRI gradient systems, and precision medical equipment, they require zero backlash and extremely high operational stability. They account for approximately 10% of the market.

**Aerospace and defense motors:** Used in satellite attitude control, space exploration platforms, and military radar servo mechanisms, they require high reliability, wide temperature tolerance, and radiation resistance. Although this type of motor only accounts for approximately 10% of sales, its relatively high unit price makes it a key supporter of the high-end market.

**Market Drivers** The continued expansion of the robotics industry has led to rapid growth in shipments of collaborative robots and specialized robots (such as quadrupeds and exoskeletons), significantly increasing demand for small-sized ring-shaped frameless torque motors. The gradual maturity of domestic manufacturers' processes and material supply chains has driven domestic substitution of frameless motors, bringing prices down to the \$200 level. This shift has accelerated the market penetration of consumer and service robots. Advances in the semiconductor and precision manufacturing sectors have driven increasing demand for zero-backlash, high-precision drives in wafer fabrication and high-end CNC machining, significantly driving shipments of mid- to high-end frameless motors. The global adoption of high-end medical imaging equipment such as CT and MRI is driving strong demand for highly reliable direct-drive motors.

Furthermore, increased investment in the aerospace sector has expanded demand for torque motors for satellites, probes, and high-end military platforms. Although this demand represents a relatively small portion, it offers significant added value.

The global Toroid Shaped Frameless Torque Motor market size was estimated at USD 844.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 12.10% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Toroid Shaped Frameless Torque Motor 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 Toroid Shaped Frameless Torque Motor 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 Toroid Shaped Frameless Torque Motor market.

## **Global Toroid Shaped Frameless Torque Motor 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**

Kollmorgen  
Aerotech  
Wittenstein  
Alva Industries  
Parker  
Maxon Motor  
Allied Motion  
TQ Robodrive  
Magnetic Innovations  
Tecnotion  
Moog  
Nidec  
Akribis  
Celera Motion  
Mosrac  
Kinco  
Haozhi Industrial  
Weiguang  
Chengdu ELECTRIC MFG  
Wolong  
Leadshine

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

Inner Rotor Type  
Outer Rotor Type

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

Collaborative Robots  
Humanoid Robots

Medical 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 Toroid Shaped Frameless Torque Motor Market

Overview of the regional outlook of the Toroid Shaped Frameless Torque Motor 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 Toroid Shaped Frameless Torque Motor 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 Toroid Shaped Frameless Torque Motor, 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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