

Global Frameless Direct-Drive Motor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Frameless Direct-Drive Motor market size is expected to reach \$ 1224 million by 2032, rising at a market growth of 7.9% CAGR during the forecast period (2026-2032).

In 2025, global production of frameless direct-drive motors reached 1.36 million units, with an estimated average selling price of US\$520 per unit. Frameless direct-drive motors are high-precision motors composed of stator and rotor assemblies that are directly embedded into the customer's equipment structure. They typically lack the traditional motor housing, end covers, bearings, output shafts, and independent mounting flanges. The motor body itself provides support, heat dissipation, bearings, and structural positioning, achieving a more compact space, higher torque density, lower transmission backlash, and better dynamic response. Applications include industrial robots, collaborative robots, humanoid robots, medical/surgical robots, semiconductor equipment, machine tool turntables and spindles, electronic manufacturing equipment, optical and laser equipment, aerospace, radar/antenna turntables, AGVs/AMRs, exoskeletons, and precision automation equipment. The upstream of the industry chain mainly includes rare earth permanent magnet materials, silicon steel sheets/electrical steel, enameled wire, insulating materials, epoxy potting materials, temperature sensors, Hall elements, encoders, power devices, servo drives, precision machined parts, and heat dissipation materials. The midstream includes electromagnetic design, stator winding, rotor magnet assembly, potting and encapsulation, dynamic balancing, testing and calibration, and application adaptation. The downstream includes robot manufacturers, machine tool manufacturers, semiconductor equipment manufacturers, medical equipment manufacturers, automation system integrators, and aerospace and defense equipment companies. Gross profit margin is approximately 25%-40%.

Globally, North American demand is concentrated in robotics, aerospace, medical, and semiconductor equipment, characterized by a high proportion of high-end customized and high-reliability products. Europe, centered on Germany, Switzerland, the Netherlands, and Italy, covers machine tools, precision automation, medical, and industrial robots, with technological advantages in high precision, liquid cooling, large hollow apertures, and system integration. The Asia-Pacific region is experiencing rapid growth, with China, Japan, South Korea, and Taiwan showing significant increases in demand for robotics, electronics manufacturing, semiconductor equipment, and automated production lines. Chinese manufacturers are accelerating substitution in the supply chain of frameless torque motors for robot joints, collaborative robots, and humanoid robots, demonstrating strong price competitiveness. However, they still lag behind European, American, and Japanese companies in high-end machine tools, aerospace, and ultra-high-precision servo systems. In the future, frameless direct drive motors will develop along the lines of high torque density, small size and lightweight, large hollow aperture, low cogging torque, low temperature rise, high overload capacity, liquid cooling, integrated encoder/brake/driver, modular robot joints, workshop-level mass production cost reduction and domestic substitution; at the same time, humanoid robots, collaborative robots, semiconductor equipment, surgical robots and high-end CNC machine tools will become the most important incremental markets.

This report studies the global Frameless Direct-Drive Motor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Frameless Direct-Drive Motor and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Frameless Direct-Drive Motor that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Frameless Direct-Drive Motor total production and demand, 2021-2032, (K Units)

Global Frameless Direct-Drive Motor total production value, 2021-2032, (USD Million)

Global Frameless Direct-Drive Motor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Frameless Direct-Drive Motor consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Frameless Direct-Drive Motor domestic production, consumption, key domestic manufacturers and share

Global Frameless Direct-Drive Motor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Frameless Direct-Drive Motor production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Frameless Direct-Drive Motor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Frameless Direct-Drive Motor market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Parker Hannifin, Kollmorgen, Allied Motion, Moog, ETEL, ALXION, Novanta, Aerotech, Inc., ThinGap, Delta Line, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Frameless Direct-Drive Motor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Frameless Direct-Drive Motor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Frameless Direct-Drive Motor Market, Segmentation by Type:

Frameless BLDC Motor

Frameless Torque Motor

Hollow Shaft Frameless Motor

Disc/Flat Frameless Motor

Built-in Direct Drive Torque Motor

Global Frameless Direct-Drive Motor Market, Segmentation by Cooling Method:

Natural Cooling

Air Cooling

Liquid Cooling/Water Cooling

Global Frameless Direct-Drive Motor Market, Segmentation by Torque Output:

Low/Medium Torque Type

High Torque Type

Global Frameless Direct-Drive Motor Market, Segmentation by Application:

Industrial Robots

Medical Equipment

Semiconductor Equipment

Machine Tools

Others

Companies Profiled:

Parker Hannifin

Kollmorgen

Allied Motion

Moog

ETEL

ALXION

Novanta

Aerotech, Inc.

ThinGap

Delta Line

Maxon Group

Harmonic Drive

Akribis Systems

Tecnotion

Guangzhou Haozhi Industrial

Kinco

HAN'S MOTOR

Sengle Electric

Suzhou Zhiwei Precision Drive Control Technology

Mosrac

Viso Automation

Shenzhen Dynamikwell Technology

Suzhou VEICHI Electric

Shanghai Darui Micromotor

Suzhou Yan Machine Technology

Key Questions Answered:

1. How big is the global Frameless Direct-Drive Motor market?
2. What is the demand of the global Frameless Direct-Drive Motor market?
3. What is the year over year growth of the global Frameless Direct-Drive Motor market?
4. What is the production and production value of the global Frameless Direct-Drive Motor market?
5. Who are the key producers in the global Frameless Direct-Drive Motor market?
6. What are the growth factors driving the market demand?

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