

# Global Frameless Torque Motor for Humanoid Robot Rotating Joint Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Frameless Torque Motor for Humanoid Robot Rotating Joint market size is expected to reach \$ 954 million by 2032, rising at a market growth of 24.4% CAGR during the forecast period (2026-2032).

In 2025, global Frameless Torque Motors for Robotic Arm production reached approximately 571.4 k units with an average global market price of around US\$350 per unit. Frameless torque motor is a permanent magnet servo motor specially designed for integrated drive. Its core features are ? without traditional motor shell, bearing and encoder ?. It is only composed of two parts: stator (external steel sheet and copper winding) and rotor (internal permanent magnet steel ring) ?45. By embedding directly into the robot joint structure, the motor can output high torque and precise motion control to meet the requirements of rotating joints for compact space and high dynamic response.

The future industry development trend for the frameless torque motor for humanoid robot rotating joints points to the technological route of integrated joint modules and the stage of scaled mass production. During its third-quarter 2025 earnings call, Kinco Automation disclosed that the main driver of its robotics business growth is the rapid development of humanoid robots and other related directions. Sales of frameless torque motors in the first three quarters increased significantly year-on-year, pushing the revenue share of its robotics business to exceed half of the company's total revenue for the first time. The company has explicitly focused on motion control solutions for both legged and wheeled humanoid robots, with core products including frameless torque motors, hollow shaft drives, and planetary gearboxes. Leadshine Technology explicitly stated in its 2025 board of directors' work report that its frameless torque motor

business has begun explosive growth, with annual deliveries exceeding 120,000 units. The company's core robotics components have entered the supply chains of 80 percent of mainstream domestic humanoid robot manufacturers, and it is currently constructing automated production capacity of two million units per year. Weiguang Holdings revealed during its 2025 earnings call that the robotic joint modules developed by its wholly-owned subsidiary have passed verification by individual complete machine manufacturers and have entered the small-batch delivery stage. These modules integrate frameless torque motors with components such as encoders. The policy front also provides clear support. The Science, Technology and Economy Commission of Shanghai Pudong New Area issued a special application notice, providing support not exceeding a certain percentage of the first batch sales contract value for enterprises undertaking the industrialization of frameless torque motors for humanoid robots. The Beijing Economic-Technological Development Area has also explicitly provided subsidies based on a percentage of supply value to enterprises that supply core components, including servo motors, to robot complete machine manufacturers. In summary, the major trends in the frameless torque motor industry for humanoid robot rotating joints are as follows: the technological route is upgrading from single motor sales to integrated joint modules that incorporate reducers and encoders; the profit focus is shifting from general-purpose products to high-torque-density specialized motors; and a company's revenue growth and profit margins will depend on its progress in industrializing core areas such as magnetic circuit optimization design, process consistency control, and module integration capabilities.

This report studies the global Frameless Torque Motor for Humanoid Robot Rotating Joint production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Frameless Torque Motor for Humanoid Robot Rotating Joint 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 Torque Motor for Humanoid Robot Rotating Joint that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Frameless Torque Motor for Humanoid Robot Rotating Joint total production and demand, 2021-2032, (K Units)

Global Frameless Torque Motor for Humanoid Robot Rotating Joint total production value, 2021-2032, (USD Million)

Global Frameless Torque Motor for Humanoid Robot Rotating Joint production by

region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units),  
(based on production site)

Global Frameless Torque Motor for Humanoid Robot Rotating Joint consumption by  
region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Frameless Torque Motor for Humanoid Robot Rotating Joint domestic  
production, consumption, key domestic manufacturers and share

Global Frameless Torque Motor for Humanoid Robot Rotating Joint production by  
manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K  
Units)

Global Frameless Torque Motor for Humanoid Robot Rotating Joint production by Type,  
production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Frameless Torque Motor for Humanoid Robot Rotating Joint production by  
Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Frameless Torque Motor for Humanoid  
Robot Rotating Joint 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 Kollmorgen,  
Aerotech, Wittenstein, Parker, Sensata, Maxon Motor, Allied Motion, TQ Robodrive,  
Magnetic Innovations, Tecnotion, 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 Torque Motor for Humanoid Robot Rotating  
Joint 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 Torque Motor for Humanoid Robot Rotating Joint Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Frameless Torque Motor for Humanoid Robot Rotating Joint Market,  
Segmentation by Type:

High-Torque Frameless Torque Motor

Lightweight Low-Torque Frameless Torque Motor

Global Frameless Torque Motor for Humanoid Robot Rotating Joint Market,  
Segmentation by Slot:

Slotted

Slotless

Global Frameless Torque Motor for Humanoid Robot Rotating Joint Market,  
Segmentation by Peak Torque:

Below 100Nm

Above 100Nm

## Global Frameless Torque Motor for Humanoid Robot Rotating Joint Market, Segmentation by Application:

Upper Limb Joints

Lower Limb Joints

Hand Joints

Others

## Companies Profiled:

Kollmorgen

Aerotech

Wittenstein

Parker

Sensata

Maxon Motor

Allied Motion

TQ Robodrive

Magnetic Innovations

Tecnotion

Moog

Nidec

Akribis

Celera Motion

Shenzhen Mosrac Motor

Kinco Automation (Shanghai)

Guangzhou Haozhi Industrial

Chengdu Weijing Motor

Wolong Electric Group

China Leadshine Technology

#### Key Questions Answered:

1. How big is the global Frameless Torque Motor for Humanoid Robot Rotating Joint market?
2. What is the demand of the global Frameless Torque Motor for Humanoid Robot Rotating Joint market?
3. What is the year over year growth of the global Frameless Torque Motor for Humanoid Robot Rotating Joint market?
4. What is the production and production value of the global Frameless Torque Motor for Humanoid Robot Rotating Joint market?
5. Who are the key producers in the global Frameless Torque Motor for Humanoid Robot Rotating Joint market?
6. What are the growth factors driving the market demand?

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