

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

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Abstracts

The global Frameless Torque Motor market size is expected to reach \$ 1441 million by 2032, rising at a market growth of 8.2% CAGR during the forecast period (2026-2032). The frameless torque motor supports the rotor through the bearing of the mechanical equipment itself and can be directly embedded in the equipment, which greatly meets the design requirements of high integration. This type of motor has the characteristics of small size, light weight and high power, so it is especially suitable for integration into Mechanism components such as machinery, robotic joints, rotating parts and actuators. Frameless torque motors are essentially stators and rotors directly embedded into the customer's mechanism. Supported by the equipment's own bearings, they output high torque and high bandwidth via direct drive, achieving higher torque density and a more compact joint/turntable structure within the same volume. The strongest demand for traction comes from three types of industrial scenarios: First, robot joints and high-end automation mechanisms. To reduce backlash, maintenance, and dynamic limitations caused by gearboxes, more and more solutions are shifting to direct drive/semi-direct drive and adopting frameless structures to 'integrate the motor into the structure.' Second, semiconductors and precision equipment (such as turntables, alignment, and high-repeatability positioning mechanisms). Customers prioritize low cogging torque, thermal efficiency, and thermal drift control; direct-drive torque motors are a natural fit for these platforms that are 'sensitive to heat and micro-vibrations.' Third, aerospace/military/optoelectronic pods and other high-reliability, miniaturized systems. Frameless direct drives facilitate customized mounting flanges, hollow shafts, and structural integration, and are also more conducive to sealing and impact-resistant designs in harsh environments.

The global supply landscape is broadly divided into two camps: 'standardized platforms from major motion control manufacturers' and 'high-performance series from specialized direct drive manufacturers.' Motion control companies like Kollmorgen offer a wide

range of standard specifications through their KBM series and support rapid customization of windings, leads, and stack thicknesses, making them suitable for equipment manufacturers seeking stable supply, engineering support, and scalable deployment. On the other hand, specialized direct drive manufacturers like Tecnotion and ETEL emphasize the ultimate in 'torque density, low cogging, and thermal design,' making them highly sought after in semiconductors, life sciences, and high-end machine tools/rotary stages. For example, Tecnotion's QTR series highlights ultra-thinness, high torque density, low thermal resistance, and low cogging, explicitly targeting applications in semiconductors, robotics, and factory automation. ETEL also uses low cogging and thermal efficiency as core selling points for its precision equipment. Meanwhile, manufacturers like Moog have differentiated themselves in the areas of 'robot joints (including hollow shaft kits)' and 'aerospace and military direct drive': Moog positions its frameless direct drive motors for multiple scenarios in military, aerospace, and industrial applications, building a high-end barrier with indicators such as high linearity and low electrical time constant.

In the next 3-5 years, the product evolution of frameless torque motors will revolve around 'higher torque density + lower loss and thermal drift + easier integration': on the one hand, the structure will continue to move towards ultra-thinness, larger inner diameter, and lower cogging/lower harmonics (reducing micro-vibration and velocity ripple), while strengthening the heat conduction path and packaging process to improve continuous torque capability; Tecnotion has already made 'ultra-thin, high torque density, low thermal resistance, low cogging/low THD' directional features in its series, and ETEL also emphasizes the importance of low cogging and high thermal efficiency for precision equipment. On the other hand, competition will accelerate its shift from 'selling motors' to 'selling deliverable joint/turntable-level solutions': frameless motors are packaged with encoders, brakes, actuators, thermal management, and assembly tolerance guidelines, reducing the engineering risks for customers from prototype to mass production; Kollmorgen and others have emphasized the embedded integration of frameless motors and engineering methods for robot joints/compact actuators in their public materials. The most important incremental track will come from the upgrade and iteration of higher-degree-of-freedom robots (including humanoid/collaborative) and semiconductor devices: TQ's case materials show that its ILM frameless kit has been used in humanoid robot joint design, reflecting that the 'high torque density + compact integration' approach is entering a wider range of robot forms.

This report studies the global Frameless Torque Motor production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Frameless Torque 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 Kollmorgen, Maxon Group, Allient, Magnetic Innovations, Alva, Lin Engineering, Johnson Electric, Tecnotion, Nidec, Pranshu Electricals, 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 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 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Frameless Torque Motor Market, Segmentation by Type:

Diameter?100mm

Diameter 100-200mm

Diameter?200mm

Global Frameless Torque Motor Market, Segmentation by Feature:

Frameless Outrunner Motor

Frameless Intrunner Motor

Global Frameless Torque Motor Market, Segmentation by Application:

Food and Packaging Industry

Robotics

Semiconductor

Machine Tool

Others

Companies Profiled:

Kollmorgen

Maxon Group

Allient

Magnetic Innovations

Alva

Lin Engineering

Johnson Electric

Tecnotion

Nidec

Pranshu Electricals

Motion Control Products

Alxion

Moog

Agito Akribis

Rozum Robotics

Icpe

Parker

Novanta

Sensata Technologies

Leaderdrive

Shenzhen Mosrac Motor

CubeMars

ETEL

TQ Group

Key Questions Answered:

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

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