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

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Abstracts

The global Frameless Torque Motors market size is expected to reach $ 1399 million by 2032, rising at a market growth of 9.6% CAGR during the forecast period (2026-2032).

Frameless torque motors are high-torque-density rotary drive units based mainly on permanent-magnet synchronous or brushless DC electromagnetic designs. They are supplied primarily as active stator and permanent-magnet rotor components, while the OEM integrates the shaft, bearings, housing, encoder, and thermal structure into the machine. This study focuses on frameless torque motors used in direct-drive or low-reduction-ratio servo systems. Typical purchasing parameters include continuous and peak torque, stator outer diameter, hollow-bore diameter, axial length, rated voltage, speed, torque constant, cogging torque, and cooling conditions. Their value lies in eliminating a standalone motor housing and reducing transmission elements, thereby improving torque per unit volume and weight, integration flexibility, dynamic response, and motion smoothness. Major end markets include robotics, semiconductor equipment, machine tools, medical and life science equipment, aerospace and defense, and other precision industrial equipment. Major cost inputs include copper, electrical steel, rare-earth permanent magnets, insulation and potting materials, and precision manufacturing and testing. Key technical barriers include electromagnetic design, winding and slot fill, magnetic-circuit and cogging-torque control, thermal management, and production consistency. The blended gross margin is approximately 42%.

Market Trends

The market is shifting from heavily customized direct-drive motors toward standardized frame sizes, scalable winding families, and modular integration. Robot joints are

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pushing performance gains in compact products through lightweight structures, larger hollow bores, higher overload capability, and lower temperature rise, while semiconductor equipment, precision rotary stages, and machine tools continue to support demand for medium- and large-size motors with smooth low-speed motion. Low-cogging designs, high slot fill, potting-based thermal management, and higher power density are key upgrade directions.

Drivers

Expansion of industrial, collaborative, and humanoid robots is increasing demand for compact high-torque drives, while investment in semiconductor equipment and high-end machine tools supports medium- and large-size direct-drive products. Frameless architectures can be embedded directly into the customer's mechanical structure, reducing couplings, standalone housings, and selected transmission elements while lowering package size and system inertia.

Restraints

Motor performance depends strongly on the customer's bearing arrangement, encoder, assembly tolerances, and thermal structure, creating a relatively high system-design threshold. Volatility in rare-earth magnet costs and the precision required in winding and potting processes also constrain rapid low-cost scaling.

Opportunities

Standardization of robot-joint platforms is expanding the volume market for common frame sizes and low-voltage windings. High-vacuum, cleanroom, medical, and aerospace environments create higher-value opportunities for reliable customized products.

Challenges

Leading customers typically require long life, low torque ripple, batch consistency, and fast customization at the same time. Suppliers must balance electromagnetic design, thermal management, manufacturing automation, and quality validation.

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Industry Chain Analysis

Upstream inputs include copper wire, electrical steel, NdFeB magnets, insulation materials, potting compounds, and temperature sensors. Midstream manufacturing centers on core processing, winding, magnet assembly, potting, balancing, and electrical testing. Downstream robotics, semiconductor equipment, machine tool, medical, and aerospace OEMs integrate bearings, encoders, housings, and the final mechanical structure.

Segment Insights

By continuous torque, products below 20 Nm mainly serve robotics and compact actuators, while products above 20 Nm are more common in machine-tool rotary axes, semiconductor equipment, and large precision rotary platforms. By stator outer diameter, small-diameter products emphasize low weight and overload capability, whereas medium and large sizes emphasize continuous torque, thermal stability, and smooth low-speed motion. Inner-rotor designs have broader general use, while outer-rotor designs are attractive where a longer torque arm and high torque per package volume are priorities.

Downstream Market Opportunities

Robotics remains the most attractive incremental market, particularly humanoid, collaborative, and quadruped robot joints. Semiconductor equipment provides steady precision direct-drive demand in wafer handling, inspection, positioning, and vacuum-motion platforms. High-end machine tools, medical imaging and surgical equipment, optical rotary stages, and aerospace servo systems provide additional differentiated opportunities.

Regional Insights

Asia is the most important production and demand region due to its concentration of robotics, electronics manufacturing, semiconductor equipment, and machine-tool industries, with China's robotics expansion accelerating the development of local frameless-motor supply. Europe has a strong base in machine tools, precision automation, and advanced direct-drive technology, while North American demand is more concentrated in semiconductor equipment, aerospace, defense, medical, and high-

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end automation.

Competitive Landscape Analysis

Participants include established motion-control vendors, specialist direct-drive motor companies, and rapidly expanding Chinese suppliers of core robot components. International vendors retain deep engineering experience in high-precision, high-reliability, and medium- to high-power products, while Chinese suppliers are improving quickly in low-voltage compact robot motors, rapid customization, and cost control. Competition is shifting from headline torque alone toward torque density, thermal rise, cogging torque, batch consistency, delivery speed, and collaborative engineering capability.

Report Scope

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

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

Highlights and key features of the study

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

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

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

Global Frameless Torque Motors consumption by region & country, CAGR,

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2021-2032 & (Units)

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

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

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

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

This report profiles key players in the global Frameless Torque Motors 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, Parker Hannifin, Moog, Allient, Aerotech, Lin Engineering, Tecnotion, ETEL, TQ-RoboDrive, Maxon, 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 Motors market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (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 Motors Market, By Region:

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United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Frameless Torque Motors Market, Segmentation by Type:

<1 Nm

1–<5 Nm

5–<20 Nm

20–<100 Nm

?100 Nm

Global Frameless Torque Motors Market, Segmentation by Stator Outer Diameter:

<50 mm

50–<100 mm

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100–<200 mm

200–<400 mm

?400 mm

Global Frameless Torque Motors Market, Segmentation by Rated Voltage:

<48 V

48–<100 V

100–<300 V

?300 V

Global Frameless Torque Motors Market, Segmentation by Rotor Configuration:

Inner Rotor

Outer Rotor

Global Frameless Torque Motors Market, Segmentation by Application:

Robotics

Semiconductor Equipment

Machine Tools

Medical and Life Science Equipment

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Aerospace and Defense

Others

Companies Profiled:

Kollmorgen

Parker Hannifin

Moog

Allient

Aerotech

Lin Engineering

Tecnotion

ETEL

TQ-RoboDrive

Maxon

Magnetic Innovations

Johnson Electric

Kinco Automation

Guangzhou Haozhi Industrial

Zhejiang Hechuan Technology

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DINGS

Nanchang Kude Intelligent Technology

Shenzhen Qianghe Motor

Key Questions Answered

1. How big is the global Frameless Torque Motors market?
2. What is the demand of the global Frameless Torque Motors market?
3. What is the year over year growth of the global Frameless Torque Motors market?
4. What is the total value of the global Frameless Torque Motors market?
5. Who are the Major Players in the global Frameless Torque Motors market?
6. What are the growth factors driving the market demand?

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info@marketpublishers.com

Contents

1 SUPPLY SUMMARY

1.1 Frameless Torque Motors Introduction
1.2 World Frameless Torque Motors Supply & Forecast
  1.2.1 World Frameless Torque Motors Production Value (2021 & 2025 & 2032)
  1.2.2 World Frameless Torque Motors Production (2021-2032)
  1.2.3 World Frameless Torque Motors Pricing Trends (2021-2032)
1.3 World Frameless Torque Motors Production by Region (Based on Production Site)
  1.3.1 World Frameless Torque Motors Production Value by Region (2021-2032)
  1.3.2 World Frameless Torque Motors Production by Region (2021-2032)
  1.3.3 World Frameless Torque Motors Average Price by Region (2021-2032)
  1.3.4 North America Frameless Torque Motors Production (2021-2032)
  1.3.5 Europe Frameless Torque Motors Production (2021-2032)
  1.3.6 China Frameless Torque Motors Production (2021-2032)
  1.3.7 Japan Frameless Torque Motors Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Frameless Torque Motors Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Frameless Torque Motors Major Market Trends

2 DEMAND SUMMARY

2.1 World Frameless Torque Motors Demand (2021-2032)
2.2 World Frameless Torque Motors Consumption by Region
  2.2.1 World Frameless Torque Motors Consumption by Region (2021-2026)
  2.2.2 World Frameless Torque Motors Consumption Forecast by Region (2027-2032)
2.3 United States Frameless Torque Motors Consumption (2021-2032)
2.4 China Frameless Torque Motors Consumption (2021-2032)
2.5 Europe Frameless Torque Motors Consumption (2021-2032)
2.6 Japan Frameless Torque Motors Consumption (2021-2032)
2.7 South Korea Frameless Torque Motors Consumption (2021-2032)
2.8 ASEAN Frameless Torque Motors Consumption (2021-2032)
2.9 India Frameless Torque Motors Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Frameless Torque Motors Production Value by Manufacturer (2021-2026)

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3.2 World Frameless Torque Motors Production by Manufacturer (2021-2026)
3.3 World Frameless Torque Motors Average Price by Manufacturer (2021-2026)
3.4 Frameless Torque Motors Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Frameless Torque Motors Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Frameless Torque Motors in 2025
  3.5.3 Global Concentration Ratios (CR8) for Frameless Torque Motors in 2025
3.6 Frameless Torque Motors Market: Overall Company Footprint Analysis
  3.6.1 Frameless Torque Motors Market: Region Footprint
  3.6.2 Frameless Torque Motors Market: Company Product Type Footprint
  3.6.3 Frameless Torque Motors Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Frameless Torque Motors Production Value Comparison
  4.1.1 United States VS China: Frameless Torque Motors Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Frameless Torque Motors Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Frameless Torque Motors Production Comparison
  4.2.1 United States VS China: Frameless Torque Motors Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Frameless Torque Motors Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Frameless Torque Motors Consumption Comparison
  4.3.1 United States VS China: Frameless Torque Motors Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Frameless Torque Motors Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Frameless Torque Motors Manufacturers and Market Share, 2021-2026
  4.4.1 United States Based Frameless Torque Motors Manufacturers, Headquarters and Production Site (States, Country)

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4.4.2 United States Based Manufacturers Frameless Torque Motors Production Value (2021-2026)
4.4.3 United States Based Manufacturers Frameless Torque Motors Production (2021-2026)
4.5 China Based Frameless Torque Motors Manufacturers and Market Share
4.5.1 China Based Frameless Torque Motors Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Frameless Torque Motors Production Value (2021-2026)
4.5.3 China Based Manufacturers Frameless Torque Motors Production (2021-2026)
4.6 Rest of World Based Frameless Torque Motors Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Frameless Torque Motors Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Frameless Torque Motors Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Frameless Torque Motors Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Frameless Torque Motors Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 <1 Nm
5.2.2 1–<5 Nm
5.2.3 5–<20 Nm
5.2.4 20–<100 Nm
5.2.5 ?100 Nm
5.3 Market Segment by Type
5.3.1 World Frameless Torque Motors Production by Type (2021-2032)
5.3.2 World Frameless Torque Motors Production Value by Type (2021-2032)
5.3.3 World Frameless Torque Motors Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY STATOR OUTER DIAMETER

6.1 World Frameless Torque Motors Market Size Overview by Stator Outer Diameter: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Stator Outer Diameter

+357 96 030922
info@marketpublishers.com

6.2.1 <50 mm
6.2.2 50–<100 mm
6.2.3 100–<200 mm
6.2.4 200–<400 mm
6.2.5 ?400 mm
6.3 Market Segment by Stator Outer Diameter
6.3.1 World Frameless Torque Motors Production by Stator Outer Diameter (2021-2032)
6.3.2 World Frameless Torque Motors Production Value by Stator Outer Diameter (2021-2032)
6.3.3 World Frameless Torque Motors Average Price by Stator Outer Diameter (2021-2032)

7 MARKET ANALYSIS BY RATED VOLTAGE

7.1 World Frameless Torque Motors Market Size Overview by Rated Voltage: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Rated Voltage
7.2.1 <48 V
7.2.2 48–<100 V
7.2.3 100–<300 V
7.2.4 ?300 V
7.3 Market Segment by Rated Voltage
7.3.1 World Frameless Torque Motors Production by Rated Voltage (2021-2032)
7.3.2 World Frameless Torque Motors Production Value by Rated Voltage (2021-2032)
7.3.3 World Frameless Torque Motors Average Price by Rated Voltage (2021-2032)

8 MARKET ANALYSIS BY ROTOR CONFIGURATION

8.1 World Frameless Torque Motors Market Size Overview by Rotor Configuration: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Rotor Configuration
8.2.1 Inner Rotor
8.2.2 Outer Rotor
8.3 Market Segment by Rotor Configuration
8.3.1 World Frameless Torque Motors Production by Rotor Configuration (2021-2032)
8.3.2 World Frameless Torque Motors Production Value by Rotor Configuration (2021-2032)
8.3.3 World Frameless Torque Motors Average Price by Rotor Configuration

+357 96 030922
info@marketpublishers.com

(2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Frameless Torque Motors Market Size Overview by Application: 2021 VS 2025 VS 2032
9.2 Segment Introduction by Application
  9.2.1 Robotics
  9.2.2 Semiconductor Equipment
  9.2.3 Machine Tools
  9.2.4 Medical and Life Science Equipment
  9.2.5 Aerospace and Defense
  9.2.6 Others
9.3 Market Segment by Application
  9.3.1 World Frameless Torque Motors Production by Application (2021-2032)
  9.3.2 World Frameless Torque Motors Production Value by Application (2021-2032)
  9.3.3 World Frameless Torque Motors Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Kollmorgen
  10.1.1 Kollmorgen Details
  10.1.2 Kollmorgen Major Business
  10.1.3 Kollmorgen Frameless Torque Motors Product and Services
  10.1.4 Kollmorgen Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
  10.1.5 Kollmorgen Recent Developments/Updates
  10.1.6 Kollmorgen Competitive Strengths & Weaknesses
10.2 Parker Hannifin
  10.2.1 Parker Hannifin Details
  10.2.2 Parker Hannifin Major Business
  10.2.3 Parker Hannifin Frameless Torque Motors Product and Services
  10.2.4 Parker Hannifin Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
  10.2.5 Parker Hannifin Recent Developments/Updates
  10.2.6 Parker Hannifin Competitive Strengths & Weaknesses
10.3 Moog
  10.3.1 Moog Details
  10.3.2 Moog Major Business

+357 96 030922
info@marketpublishers.com

10.3.3 Moog Frameless Torque Motors Product and Services
10.3.4 Moog Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.3.5 Moog Recent Developments/Updates
10.3.6 Moog Competitive Strengths & Weaknesses
10.4 Allient
10.4.1 Allient Details
10.4.2 Allient Major Business
10.4.3 Allient Frameless Torque Motors Product and Services
10.4.4 Allient Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.4.5 Allient Recent Developments/Updates
10.4.6 Allient Competitive Strengths & Weaknesses
10.5 Aerotech
10.5.1 Aerotech Details
10.5.2 Aerotech Major Business
10.5.3 Aerotech Frameless Torque Motors Product and Services
10.5.4 Aerotech Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.5.5 Aerotech Recent Developments/Updates
10.5.6 Aerotech Competitive Strengths & Weaknesses
10.6 Lin Engineering
10.6.1 Lin Engineering Details
10.6.2 Lin Engineering Major Business
10.6.3 Lin Engineering Frameless Torque Motors Product and Services
10.6.4 Lin Engineering Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.6.5 Lin Engineering Recent Developments/Updates
10.6.6 Lin Engineering Competitive Strengths & Weaknesses
10.7 Tecnotion
10.7.1 Tecnotion Details
10.7.2 Tecnotion Major Business
10.7.3 Tecnotion Frameless Torque Motors Product and Services
10.7.4 Tecnotion Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.7.5 Tecnotion Recent Developments/Updates
10.7.6 Tecnotion Competitive Strengths & Weaknesses
10.8 ETEL
10.8.1 ETEL Details

+357 96 030922
info@marketpublishers.com

10.8.2 ETEL Major Business
10.8.3 ETEL Frameless Torque Motors Product and Services
10.8.4 ETEL Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.8.5 ETEL Recent Developments/Updates
10.8.6 ETEL Competitive Strengths & Weaknesses
10.9 TQ-RoboDrive
10.9.1 TQ-RoboDrive Details
10.9.2 TQ-RoboDrive Major Business
10.9.3 TQ-RoboDrive Frameless Torque Motors Product and Services
10.9.4 TQ-RoboDrive Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.9.5 TQ-RoboDrive Recent Developments/Updates
10.9.6 TQ-RoboDrive Competitive Strengths & Weaknesses
10.10 Maxon
10.10.1 Maxon Details
10.10.2 Maxon Major Business
10.10.3 Maxon Frameless Torque Motors Product and Services
10.10.4 Maxon Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.10.5 Maxon Recent Developments/Updates
10.10.6 Maxon Competitive Strengths & Weaknesses
10.11 Magnetic Innovations
10.11.1 Magnetic Innovations Details
10.11.2 Magnetic Innovations Major Business
10.11.3 Magnetic Innovations Frameless Torque Motors Product and Services
10.11.4 Magnetic Innovations Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.11.5 Magnetic Innovations Recent Developments/Updates
10.11.6 Magnetic Innovations Competitive Strengths & Weaknesses
10.12 Johnson Electric
10.12.1 Johnson Electric Details
10.12.2 Johnson Electric Major Business
10.12.3 Johnson Electric Frameless Torque Motors Product and Services
10.12.4 Johnson Electric Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.12.5 Johnson Electric Recent Developments/Updates
10.12.6 Johnson Electric Competitive Strengths & Weaknesses
10.13 Kinco Automation

+357 96 030922
info@marketpublishers.com

10.13.1 Kinco Automation Details
10.13.2 Kinco Automation Major Business
10.13.3 Kinco Automation Frameless Torque Motors Product and Services
10.13.4 Kinco Automation Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.13.5 Kinco Automation Recent Developments/Updates
10.13.6 Kinco Automation Competitive Strengths & Weaknesses
10.14 Guangzhou Haozhi Industrial
10.14.1 Guangzhou Haozhi Industrial Details
10.14.2 Guangzhou Haozhi Industrial Major Business
10.14.3 Guangzhou Haozhi Industrial Frameless Torque Motors Product and Services
10.14.4 Guangzhou Haozhi Industrial Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.14.5 Guangzhou Haozhi Industrial Recent Developments/Updates
10.14.6 Guangzhou Haozhi Industrial Competitive Strengths & Weaknesses
10.15 Zhejiang Hechuan Technology
10.15.1 Zhejiang Hechuan Technology Details
10.15.2 Zhejiang Hechuan Technology Major Business
10.15.3 Zhejiang Hechuan Technology Frameless Torque Motors Product and Services
10.15.4 Zhejiang Hechuan Technology Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.15.5 Zhejiang Hechuan Technology Recent Developments/Updates
10.15.6 Zhejiang Hechuan Technology Competitive Strengths & Weaknesses
10.16 DINGS
10.16.1 DINGS Details
10.16.2 DINGS Major Business
10.16.3 DINGS Frameless Torque Motors Product and Services
10.16.4 DINGS Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.16.5 DINGS Recent Developments/Updates
10.16.6 DINGS Competitive Strengths & Weaknesses
10.17 Nanchang Kude Intelligent Technology
10.17.1 Nanchang Kude Intelligent Technology Details
10.17.2 Nanchang Kude Intelligent Technology Major Business
10.17.3 Nanchang Kude Intelligent Technology Frameless Torque Motors Product and Services
10.17.4 Nanchang Kude Intelligent Technology Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

10.17.5 Nanchang Kude Intelligent Technology Recent Developments/Updates
10.17.6 Nanchang Kude Intelligent Technology Competitive Strengths & Weaknesses
10.18 Shenzhen Qianghe Motor
10.18.1 Shenzhen Qianghe Motor Details
10.18.2 Shenzhen Qianghe Motor Major Business
10.18.3 Shenzhen Qianghe Motor Frameless Torque Motors Product and Services
10.18.4 Shenzhen Qianghe Motor Frameless Torque Motors Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.18.5 Shenzhen Qianghe Motor Recent Developments/Updates
10.18.6 Shenzhen Qianghe Motor Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

11.1 Frameless Torque Motors Industry Chain
11.2 Frameless Torque Motors Upstream Analysis
11.2.1 Frameless Torque Motors Core Raw Materials
11.2.2 Main Manufacturers of Frameless Torque Motors Core Raw Materials
11.3 Midstream Analysis
11.4 Downstream Analysis
11.5 Frameless Torque Motors Production Mode
11.6 Frameless Torque Motors Procurement Model
11.7 Frameless Torque Motors Industry Sales Model and Sales Channels
11.7.1 Frameless Torque Motors Sales Model
11.7.2 Frameless Torque Motors Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

13.1 Methodology
13.2 Research Process and Data Source
13.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World Frameless Torque Motors Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Frameless Torque Motors Production Value by Region (2021-2026) & (USD Million)
Table 3. World Frameless Torque Motors Production Value by Region (2027-2032) & (USD Million)
Table 4. World Frameless Torque Motors Production Value Market Share by Region (2021-2026)
Table 5. World Frameless Torque Motors Production Value Market Share by Region (2027-2032)
Table 6. World Frameless Torque Motors Production by Region (2021-2026) & (Units)
Table 7. World Frameless Torque Motors Production by Region (2027-2032) & (Units)
Table 8. World Frameless Torque Motors Production Market Share by Region (2021-2026)
Table 9. World Frameless Torque Motors Production Market Share by Region (2027-2032)
Table 10. World Frameless Torque Motors Average Price by Region (2021-2026) & (US$/Unit)
Table 11. World Frameless Torque Motors Average Price by Region (2027-2032) & (US$/Unit)
Table 12. Frameless Torque Motors Major Market Trends
Table 13. World Frameless Torque Motors Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)
Table 14. World Frameless Torque Motors Consumption by Region (2021-2026) & (Units)
Table 15. World Frameless Torque Motors Consumption Forecast by Region (2027-2032) & (Units)
Table 16. World Frameless Torque Motors Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Frameless Torque Motors Producers in 2025
Table 18. World Frameless Torque Motors Production by Manufacturer (2021-2026) & (Units)
Table 19. Production Market Share of Key Frameless Torque Motors Producers in 2025
Table 20. World Frameless Torque Motors Average Price by Manufacturer (2021-2026)

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& (US$/Unit)
Table 21. Global Frameless Torque Motors Company Evaluation Quadrant
Table 22. World Frameless Torque Motors Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Frameless Torque Motors Production Site of Key Manufacturer
Table 24. Frameless Torque Motors Market: Company Product Type Footprint
Table 25. Frameless Torque Motors Market: Company Product Application Footprint
Table 26. Frameless Torque Motors Competitive Factors
Table 27. Frameless Torque Motors New Entrant and Capacity Expansion Plans
Table 28. Frameless Torque Motors Mergers & Acquisitions Activity
Table 29. United States VS China Frameless Torque Motors Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Frameless Torque Motors Production Comparison, (2021 & 2025 & 2032) & (Units)
Table 31. United States VS China Frameless Torque Motors Consumption Comparison, (2021 & 2025 & 2032) & (Units)
Table 32. United States Based Frameless Torque Motors Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Frameless Torque Motors Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Frameless Torque Motors Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Frameless Torque Motors Production (2021-2026) & (Units)
Table 36. United States Based Manufacturers Frameless Torque Motors Production Market Share (2021-2026)
Table 37. China Based Frameless Torque Motors Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Frameless Torque Motors Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Frameless Torque Motors Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Frameless Torque Motors Production, (2021-2026) & (Units)
Table 41. China Based Manufacturers Frameless Torque Motors Production Market Share (2021-2026)
Table 42. Rest of World Based Frameless Torque Motors Manufacturers, Headquarters and Production Site (State, Country)

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Table 43. Rest of World Based Manufacturers Frameless Torque Motors Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Frameless Torque Motors Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Frameless Torque Motors Production, (2021-2026) & (Units)
Table 46. Rest of World Based Manufacturers Frameless Torque Motors Production Market Share (2021-2026)
Table 47. World Frameless Torque Motors Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Frameless Torque Motors Production by Type (2021-2026) & (Units)
Table 49. World Frameless Torque Motors Production by Type (2027-2032) & (Units)
Table 50. World Frameless Torque Motors Production Value by Type (2021-2026) & (USD Million)
Table 51. World Frameless Torque Motors Production Value by Type (2027-2032) & (USD Million)
Table 52. World Frameless Torque Motors Average Price by Type (2021-2026) & (US$/Unit)
Table 53. World Frameless Torque Motors Average Price by Type (2027-2032) & (US$/Unit)
Table 54. World Frameless Torque Motors Production Value by Stator Outer Diameter, (USD Million), 2021 & 2025 & 2032
Table 55. World Frameless Torque Motors Production by Stator Outer Diameter (2021-2026) & (Units)
Table 56. World Frameless Torque Motors Production by Stator Outer Diameter (2027-2032) & (Units)
Table 57. World Frameless Torque Motors Production Value by Stator Outer Diameter (2021-2026) & (USD Million)
Table 58. World Frameless Torque Motors Production Value by Stator Outer Diameter (2027-2032) & (USD Million)
Table 59. World Frameless Torque Motors Average Price by Stator Outer Diameter (2021-2026) & (US$/Unit)
Table 60. World Frameless Torque Motors Average Price by Stator Outer Diameter (2027-2032) & (US$/Unit)
Table 61. World Frameless Torque Motors Production Value by Rated Voltage, (USD Million), 2021 & 2025 & 2032
Table 62. World Frameless Torque Motors Production by Rated Voltage (2021-2026) & (Units)
Table 63. World Frameless Torque Motors Production by Rated Voltage (2027-2032) &

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(Units)
Table 64. World Frameless Torque Motors Production Value by Rated Voltage (2021-2026) & (USD Million)
Table 65. World Frameless Torque Motors Production Value by Rated Voltage (2027-2032) & (USD Million)
Table 66. World Frameless Torque Motors Average Price by Rated Voltage (2021-2026) & (US$/Unit)
Table 67. World Frameless Torque Motors Average Price by Rated Voltage (2027-2032) & (US$/Unit)
Table 68. World Frameless Torque Motors Production Value by Rotor Configuration, (USD Million), 2021 & 2025 & 2032
Table 69. World Frameless Torque Motors Production by Rotor Configuration (2021-2026) & (Units)
Table 70. World Frameless Torque Motors Production by Rotor Configuration (2027-2032) & (Units)
Table 71. World Frameless Torque Motors Production Value by Rotor Configuration (2021-2026) & (USD Million)
Table 72. World Frameless Torque Motors Production Value by Rotor Configuration (2027-2032) & (USD Million)
Table 73. World Frameless Torque Motors Average Price by Rotor Configuration (2021-2026) & (US$/Unit)
Table 74. World Frameless Torque Motors Average Price by Rotor Configuration (2027-2032) & (US$/Unit)
Table 75. World Frameless Torque Motors Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 76. World Frameless Torque Motors Production by Application (2021-2026) & (Units)
Table 77. World Frameless Torque Motors Production by Application (2027-2032) & (Units)
Table 78. World Frameless Torque Motors Production Value by Application (2021-2026) & (USD Million)
Table 79. World Frameless Torque Motors Production Value by Application (2027-2032) & (USD Million)
Table 80. World Frameless Torque Motors Average Price by Application (2021-2026) & (US$/Unit)
Table 81. World Frameless Torque Motors Average Price by Application (2027-2032) & (US$/Unit)
Table 82. Kollmorgen Basic Information, Manufacturing Base and Competitors
Table 83. Kollmorgen Major Business

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Table 84. Kollmorgen Frameless Torque Motors Product and Services
Table 85. Kollmorgen Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 86. Kollmorgen Recent Developments/Updates
Table 87. Kollmorgen Competitive Strengths & Weaknesses
Table 88. Parker Hannifin Basic Information, Manufacturing Base and Competitors
Table 89. Parker Hannifin Major Business
Table 90. Parker Hannifin Frameless Torque Motors Product and Services
Table 91. Parker Hannifin Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 92. Parker Hannifin Recent Developments/Updates
Table 93. Parker Hannifin Competitive Strengths & Weaknesses
Table 94. Moog Basic Information, Manufacturing Base and Competitors
Table 95. Moog Major Business
Table 96. Moog Frameless Torque Motors Product and Services
Table 97. Moog Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 98. Moog Recent Developments/Updates
Table 99. Moog Competitive Strengths & Weaknesses
Table 100. Allient Basic Information, Manufacturing Base and Competitors
Table 101. Allient Major Business
Table 102. Allient Frameless Torque Motors Product and Services
Table 103. Allient Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 104. Allient Recent Developments/Updates
Table 105. Allient Competitive Strengths & Weaknesses
Table 106. Aerotech Basic Information, Manufacturing Base and Competitors
Table 107. Aerotech Major Business
Table 108. Aerotech Frameless Torque Motors Product and Services
Table 109. Aerotech Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 110. Aerotech Recent Developments/Updates
Table 111. Aerotech Competitive Strengths & Weaknesses
Table 112. Lin Engineering Basic Information, Manufacturing Base and Competitors
Table 113. Lin Engineering Major Business
Table 114. Lin Engineering Frameless Torque Motors Product and Services
Table 115. Lin Engineering Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share

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(2021-2026)
Table 116. Lin Engineering Recent Developments/Updates
Table 117. Lin Engineering Competitive Strengths & Weaknesses
Table 118. Tecnotion Basic Information, Manufacturing Base and Competitors
Table 119. Tecnotion Major Business
Table 120. Tecnotion Frameless Torque Motors Product and Services
Table 121. Tecnotion Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 122. Tecnotion Recent Developments/Updates
Table 123. Tecnotion Competitive Strengths & Weaknesses
Table 124. ETEL Basic Information, Manufacturing Base and Competitors
Table 125. ETEL Major Business
Table 126. ETEL Frameless Torque Motors Product and Services
Table 127. ETEL Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 128. ETEL Recent Developments/Updates
Table 129. ETEL Competitive Strengths & Weaknesses
Table 130. TQ-RoboDrive Basic Information, Manufacturing Base and Competitors
Table 131. TQ-RoboDrive Major Business
Table 132. TQ-RoboDrive Frameless Torque Motors Product and Services
Table 133. TQ-RoboDrive Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 134. TQ-RoboDrive Recent Developments/Updates
Table 135. TQ-RoboDrive Competitive Strengths & Weaknesses
Table 136. Maxon Basic Information, Manufacturing Base and Competitors
Table 137. Maxon Major Business
Table 138. Maxon Frameless Torque Motors Product and Services
Table 139. Maxon Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 140. Maxon Recent Developments/Updates
Table 141. Maxon Competitive Strengths & Weaknesses
Table 142. Magnetic Innovations Basic Information, Manufacturing Base and Competitors
Table 143. Magnetic Innovations Major Business
Table 144. Magnetic Innovations Frameless Torque Motors Product and Services
Table 145. Magnetic Innovations Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 146. Magnetic Innovations Recent Developments/Updates
Table 147. Magnetic Innovations Competitive Strengths & Weaknesses
Table 148. Johnson Electric Basic Information, Manufacturing Base and Competitors
Table 149. Johnson Electric Major Business
Table 150. Johnson Electric Frameless Torque Motors Product and Services
Table 151. Johnson Electric Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 152. Johnson Electric Recent Developments/Updates
Table 153. Johnson Electric Competitive Strengths & Weaknesses
Table 154. Kinco Automation Basic Information, Manufacturing Base and Competitors
Table 155. Kinco Automation Major Business
Table 156. Kinco Automation Frameless Torque Motors Product and Services
Table 157. Kinco Automation Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 158. Kinco Automation Recent Developments/Updates
Table 159. Kinco Automation Competitive Strengths & Weaknesses
Table 160. Guangzhou Haozhi Industrial Basic Information, Manufacturing Base and Competitors
Table 161. Guangzhou Haozhi Industrial Major Business
Table 162. Guangzhou Haozhi Industrial Frameless Torque Motors Product and Services
Table 163. Guangzhou Haozhi Industrial Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 164. Guangzhou Haozhi Industrial Recent Developments/Updates
Table 165. Guangzhou Haozhi Industrial Competitive Strengths & Weaknesses
Table 166. Zhejiang Hechuan Technology Basic Information, Manufacturing Base and Competitors
Table 167. Zhejiang Hechuan Technology Major Business
Table 168. Zhejiang Hechuan Technology Frameless Torque Motors Product and Services
Table 169. Zhejiang Hechuan Technology Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 170. Zhejiang Hechuan Technology Recent Developments/Updates
Table 171. Zhejiang Hechuan Technology Competitive Strengths & Weaknesses
Table 172. DINGS Basic Information, Manufacturing Base and Competitors

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Table 173. DINGS Major Business
Table 174. DINGS Frameless Torque Motors Product and Services
Table 175. DINGS Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 176. DINGS Recent Developments/Updates
Table 177. DINGS Competitive Strengths & Weaknesses
Table 178. Nanchang Kude Intelligent Technology Basic Information, Manufacturing Base and Competitors
Table 179. Nanchang Kude Intelligent Technology Major Business
Table 180. Nanchang Kude Intelligent Technology Frameless Torque Motors Product and Services
Table 181. Nanchang Kude Intelligent Technology Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 182. Nanchang Kude Intelligent Technology Recent Developments/Updates
Table 183. Nanchang Kude Intelligent Technology Competitive Strengths & Weaknesses
Table 184. Shenzhen Qianghe Motor Basic Information, Manufacturing Base and Competitors
Table 185. Shenzhen Qianghe Motor Major Business
Table 186. Shenzhen Qianghe Motor Frameless Torque Motors Product and Services
Table 187. Shenzhen Qianghe Motor Frameless Torque Motors Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 188. Shenzhen Qianghe Motor Recent Developments/Updates
Table 189. Shenzhen Qianghe Motor Competitive Strengths & Weaknesses
Table 190. Global Key Players of Frameless Torque Motors Upstream (Raw Materials)
Table 191. Global Frameless Torque Motors Typical Customers
Table 192. Frameless Torque Motors Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Frameless Torque Motors Picture
Figure 2. World Frameless Torque Motors Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Frameless Torque Motors Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Frameless Torque Motors Production (2021-2032) & (Units)
Figure 5. World Frameless Torque Motors Average Price (2021-2032) & (US$/Unit)
Figure 6. World Frameless Torque Motors Production Value Market Share by Region (2021-2032)
Figure 7. World Frameless Torque Motors Production Market Share by Region (2021-2032)
Figure 8. North America Frameless Torque Motors Production (2021-2032) & (Units)
Figure 9. Europe Frameless Torque Motors Production (2021-2032) & (Units)
Figure 10. China Frameless Torque Motors Production (2021-2032) & (Units)
Figure 11. Japan Frameless Torque Motors Production (2021-2032) & (Units)
Figure 12. Frameless Torque Motors Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Frameless Torque Motors Consumption (2021-2032) & (Units)
Figure 15. World Frameless Torque Motors Consumption Market Share by Region (2021-2032)
Figure 16. United States Frameless Torque Motors Consumption (2021-2032) & (Units)
Figure 17. China Frameless Torque Motors Consumption (2021-2032) & (Units)
Figure 18. Europe Frameless Torque Motors Consumption (2021-2032) & (Units)
Figure 19. Japan Frameless Torque Motors Consumption (2021-2032) & (Units)
Figure 20. South Korea Frameless Torque Motors Consumption (2021-2032) & (Units)
Figure 21. ASEAN Frameless Torque Motors Consumption (2021-2032) & (Units)
Figure 22. India Frameless Torque Motors Consumption (2021-2032) & (Units)
Figure 23. Producer Shipments of Frameless Torque Motors by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Frameless Torque Motors Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Frameless Torque Motors Markets in 2025
Figure 26. United States VS China: Frameless Torque Motors Production Value Market Share Comparison (2021 & 2025 & 2032)

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Figure 27. United States VS China: Frameless Torque Motors Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Frameless Torque Motors Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Frameless Torque Motors Production Market Share 2025
Figure 30. China Based Manufacturers Frameless Torque Motors Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Frameless Torque Motors Production Market Share 2025
Figure 32. World Frameless Torque Motors Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Frameless Torque Motors Production Value Market Share by Type in 2025
Figure 34. <1 Nm
Figure 35. 1–<5 Nm
Figure 36. 5–<20 Nm
Figure 37. 20–<100 Nm
Figure 38. ?100 Nm
Figure 39. World Frameless Torque Motors Production Market Share by Type (2021-2032)
Figure 40. World Frameless Torque Motors Production Value Market Share by Type (2021-2032)
Figure 41. World Frameless Torque Motors Average Price by Type (2021-2032) & (US$/Unit)
Figure 42. World Frameless Torque Motors Production Value by Stator Outer Diameter, (USD Million), 2021 & 2025 & 2032
Figure 43. World Frameless Torque Motors Production Value Market Share by Stator Outer Diameter in 2025
Figure 44. <50 mm
Figure 45. 50–<100 mm
Figure 46. 100–<200 mm
Figure 47. 200–<400 mm
Figure 48. ?400 mm
Figure 49. World Frameless Torque Motors Production Market Share by Stator Outer Diameter (2021-2032)
Figure 50. World Frameless Torque Motors Production Value Market Share by Stator Outer Diameter (2021-2032)
Figure 51. World Frameless Torque Motors Average Price by Stator Outer Diameter

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(2021-2032) & (US$/Unit)
Figure 52. World Frameless Torque Motors Production Value by Rated Voltage, (USD Million), 2021 & 2025 & 2032
Figure 53. World Frameless Torque Motors Production Value Market Share by Rated Voltage in 2025
Figure 54. <48 V
Figure 55. 48–<100 V
Figure 56. 100–<300 V
Figure 57. ?300 V
Figure 58. World Frameless Torque Motors Production Market Share by Rated Voltage (2021-2032)
Figure 59. World Frameless Torque Motors Production Value Market Share by Rated Voltage (2021-2032)
Figure 60. World Frameless Torque Motors Average Price by Rated Voltage (2021-2032) & (US$/Unit)
Figure 61. World Frameless Torque Motors Production Value by Rotor Configuration, (USD Million), 2021 & 2025 & 2032
Figure 62. World Frameless Torque Motors Production Value Market Share by Rotor Configuration in 2025
Figure 63. Inner Rotor
Figure 64. Outer Rotor
Figure 65. World Frameless Torque Motors Production Market Share by Rotor Configuration (2021-2032)
Figure 66. World Frameless Torque Motors Production Value Market Share by Rotor Configuration (2021-2032)
Figure 67. World Frameless Torque Motors Average Price by Rotor Configuration (2021-2032) & (US$/Unit)
Figure 68. World Frameless Torque Motors Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 69. World Frameless Torque Motors Production Value Market Share by Application in 2025
Figure 70. Robotics
Figure 71. Semiconductor Equipment
Figure 72. Machine Tools
Figure 73. Medical and Life Science Equipment
Figure 74. Aerospace and Defense
Figure 75. Others
Figure 76. World Frameless Torque Motors Production Market Share by Application (2021-2032)

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Figure 77. World Frameless Torque Motors Production Value Market Share by Application (2021-2032)
Figure 78. World Frameless Torque Motors Average Price by Application (2021-2032) & (US$/Unit)
Figure 79. Frameless Torque Motors Industry Chain
Figure 80. Frameless Torque Motors Procurement Model
Figure 81. Frameless Torque Motors Sales Model
Figure 82. Frameless Torque Motors Sales Channels, Direct Sales, and Distribution
Figure 83. Methodology
Figure 84. Research Process and Data Source

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