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Global Hollow Shaft Torque Motor for Humanoid Robot Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Hollow Shaft Torque Motor for Humanoid Robot market size is expected to reach $ 292 million by 2032, rising at a market growth of 24.8% CAGR during the forecast period (2026-2032).

Hollow shaft torque motors for humanoid robots are high-torque-density permanent-magnet rotary motors designed for compact integration into humanoid robot joints. The central through-hole enables internal routing of power cables, communication harnesses, sensor wiring and other joint components, while the motor delivers precise, responsive and smooth rotational motion within a limited installation envelope. The principal product forms are frameless stator-and-rotor kits, housed hollow shaft motors and partially integrated motor assemblies incorporating encoders, temperature sensors, bearings or mechanical interfaces. Key specifications include motor outer diameter, hollow-bore diameter, continuous and peak torque, torque density, cogging torque, rotor inertia, rated voltage, operating speed, winding temperature rise and thermal dissipation capability. The market focuses on motors used in lower-limb, upper-limb, torso and waist, and head and neck joints, where lightweight construction, low torque ripple, dynamic response, reliability and efficient heat management directly affect robot payload, mobility, operating time and motion accuracy.

Key Findings

The global average selling price in 2025 was approximately US$230 per unit.

Frameless stator-and-rotor kits remained the largest product form.

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Lower-limb joints represented the largest application segment by revenue contribution.

Upper-limb joints were the fastest-expanding joint application segment.

Asia-Pacific, led by China, maintained the strongest combination of demand growth and manufacturing expansion.

The verified core supplier group comprised 26 manufacturers.

Large-diameter, high-continuous-torque motors for hip and knee joints occupied the premium price band.

Market Trends

Product development is shifting from general-purpose frameless motors toward humanoid-specific platforms with standardized frame sizes, enlarged hollow bores, higher continuous torque density, lower cogging torque and improved thermal performance. Suppliers are expanding from individual stator-and-rotor kits into coordinated motor, encoder, sensor and drive solutions, while preserving a modular interface that allows robot developers to select their own reducer and joint architecture. The increasing use of potting, optimized magnetic circuits, thin-wall structures and integrated temperature monitoring reflects the market’s transition from prototype performance optimization to repeatable production and long-duration operation.

Market Dynamics

Demand is being created by two parallel development paths. Established robot developers are redesigning joints to reduce weight, improve range of motion and extend battery operating time, while newer entrants increasingly purchase standardized frameless motor platforms to shorten development cycles. At the same time, vertically integrated robot manufacturers continue to develop selected motors internally, limiting the addressable merchant market. The competitive balance therefore depends not only on robot shipments, but also on the proportion of joint motors outsourced to independent suppliers.

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Drivers

The principal growth drivers are the expansion of humanoid robot pilot deployments, increasing joint counts, higher payload requirements and the transition from demonstration units to repeatable industrial production. Government programs supporting humanoid robot innovation, core component availability and manufacturing ecosystems are accelerating supplier investment in electromagnetic design, winding automation, testing and production capacity. Greater availability of standardized motor sizes also reduces the engineering burden for robot developers and supports faster joint-platform iteration.

Restraints

The market remains constrained by the absence of unified joint and motor interface standards, long customer validation cycles and substantial differences between prototype specifications and mass-production requirements. High-performance motors require close coordination among electromagnetic design, reducer selection, encoder accuracy, drive algorithms and heat dissipation. A motor that performs well in laboratory testing may require redesign when exposed to repeated impact loads, extended duty cycles or compact sealed-joint conditions. Internal motor development by major robot manufacturers also reduces the volume available to independent suppliers.

Opportunities

The strongest opportunities lie in modular frameless motor kits, large-hollow-bore designs and product families covering multiple joint sizes through a common electromagnetic and manufacturing platform. Suppliers capable of supporting shoulder, elbow, waist, hip, knee and ankle joints with coordinated frame sizes can gain a larger share of each robot platform. Additional opportunities exist in partially integrated motor assemblies, regionalized supply chains, automated winding and testing, and customized high-voltage or high-thermal-capacity products for industrial humanoids. Policy support for core components and supply-chain security further favors manufacturers with local production and engineering support.

Challenges

The central engineering challenge is balancing torque density, hollow-bore size, motor

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weight, temperature rise, efficiency, cogging torque and cost within a highly restricted joint envelope. Enlarging the hollow bore can reduce available electromagnetic volume, while increasing continuous torque raises winding and magnet temperature. Suppliers must also control lamination consistency, winding fill factor, magnet positioning, rotor balance, insulation reliability and potting quality across production batches. Demand uncertainty remains another risk because robot capacity announcements, customer orders and actual deliveries may occur on different timelines.

Industry Chain Analysis

The upstream industry includes permanent magnets, electrical steel laminations, copper wire, insulation materials, adhesives, thermal materials, shafts, sleeves, bearings, encoders and temperature sensors. Midstream manufacturers undertake electromagnetic and thermal design, lamination processing, winding, stator potting, magnet assembly, rotor balancing, inspection and performance testing. Downstream customers include joint-module producers and humanoid robot manufacturers, which integrate the motor with reducers, encoders, torque sensors, brakes, drives and structural components. Manufacturing consistency and joint-level engineering support are critical links between motor production and robot commercialization.

Value Chain Analysis

Value creation is concentrated in electromagnetic topology, thermal design, material selection, precision winding, low-cogging manufacturing and application-specific customization rather than in raw material conversion alone. Frameless kits provide customers with greater mechanical design freedom, while partially integrated assemblies allow motor suppliers to capture additional value through sensing, bearings and interface engineering. As volumes rise, automation and standardized platforms will reduce unit prices, but suppliers with verified reliability, rapid customization and joint-system engineering capability should retain stronger pricing power than commodity motor producers.

Segment Insights

By product form, frameless stator-and-rotor kits account for the largest share because they allow the reducer, housing, bearings and sensing components to be integrated directly into the robot joint. Housed hollow shaft motors serve applications requiring

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easier assembly and replacement, while partially integrated motor assemblies are gaining attention among customers seeking shorter development cycles. By motor size, products with outer diameters of approximately 50–120 mm form the mainstream demand range. By application, lower-limb joints generate the largest revenue contribution because hip, knee and ankle motors require higher torque and thermal capacity, whereas upper-limb joints are expanding faster as manipulation-oriented robots add more capable shoulder, elbow and wrist systems.

Downstream Market Opportunities

Near-term commercial opportunities are concentrated in manufacturing, warehouse handling, material transfer, inspection and other structured environments where repetitive tasks and measurable productivity can support robot investment. These applications require durable hip and knee drive systems as well as increasingly capable upper-body joints for lifting, positioning and tool interaction. Research, education and service robots remain important for product validation and low-volume sales, while broader consumer and public-service adoption will depend on improvements in system safety, battery life, reliability and total ownership cost.

Regional Insights

Asia-Pacific has the strongest current demand and supply-chain expansion, with China combining a dense humanoid robot development ecosystem, a broad motor and automation manufacturing base, and policy support for core component localization. North America remains influential in high-performance motor design, robot prototypes and advanced joint-system engineering. Europe retains strengths in high-torque-density frameless motors, precision manufacturing and premium customized products. Japan and South Korea possess established motor technology and manufacturing capabilities, although the number of suppliers publicly positioning dedicated products for humanoid robot joints remains comparatively limited.

Competitive Landscape Analysis

The competitive landscape is divided into three regional groups. North American and European suppliers are strongest in high-performance electromagnetic design, low-cogging control, thermal reliability and engineering support for demanding robot

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platforms. Chinese suppliers are expanding rapidly through broad frame-size portfolios, faster customization, integrated motion-control capabilities and competitive production costs. Japanese and South Korean suppliers benefit from established motor manufacturing and quality-control expertise but currently show a narrower publicly disclosed humanoid-specific product portfolio. Competition is moving from individual motor specifications toward platform coverage, production consistency, customer validation speed and the ability to support multiple joints within a single robot architecture.

Report Scope

This report studies the global Hollow Shaft Torque Motor for Humanoid Robot production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Hollow Shaft Torque Motor for Humanoid Robot total production and demand, 2021-2032, (K Units)

Global Hollow Shaft Torque Motor for Humanoid Robot total production value, 2021-2032, (USD Million)

Global Hollow Shaft Torque Motor for Humanoid Robot production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

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

U.S. VS China: Hollow Shaft Torque Motor for Humanoid Robot domestic

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production, consumption, key domestic manufacturers and share

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

Global Hollow Shaft Torque Motor for Humanoid Robot production by Motor Drive Technology, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

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

This report profiles key players in the global Hollow Shaft Torque Motor for Humanoid Robot 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 Regal Rexnord Corporation, TQ Systems GmbH, Allient Inc., Johnson Electric Holdings Limited, Shanghai Kinco Automation Co., Ltd., Shenzhen Leadshine Technology Co., Ltd., Nidec Corporation, maxon international ag, Shenzhen Inovance Technology Co., Ltd., Jiangsu DINGS' Intelligent Control Technology Co., Ltd., 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 Hollow Shaft Torque Motor for Humanoid Robot 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 Motor Drive Technology, 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.

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Global Hollow Shaft Torque Motor for Humanoid Robot Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Hollow Shaft Torque Motor for Humanoid Robot Market, Segmentation by Motor Drive Technology:

Direct Drive Torque Motor

Brushless DC Torque Motor

Permanent Magnet Synchronous Torque Motor

Others

Global Hollow Shaft Torque Motor for Humanoid Robot Market, Segmentation by Motor Outer Diameter:

Up to 50 mm

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Above 50 mm to 80 mm

Above 80 mm to 120 mm

Above 120 mm

Global Hollow Shaft Torque Motor for Humanoid Robot Market, Segmentation by Continuous Torque:

Up to 1 N·m

Above 1 N·m to 5 N·m

Above 5 N·m to 15 N·m

Above 15 N·m

Global Hollow Shaft Torque Motor for Humanoid Robot Market, Segmentation by Application:

Lower Limb Joints

Upper Limb Joints

Torso and Waist Joints

Head and Neck Joints

Others

Companies Profiled:

Regal Rexnord Corporation

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TQ Systems GmbH

Allient Inc.

Johnson Electric Holdings Limited

Shanghai Kinco Automation Co., Ltd.

Shenzhen Leadshine Technology Co., Ltd.

Nidec Corporation

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Shenzhen Inovance Technology Co., Ltd.

Jiangsu DINGS' Intelligent Control Technology Co., Ltd.

Zhejiang Hechuan Technology Co., Ltd.

Shanghai MOONS' Electric Co., Ltd.

Guangzhou Haozhi Industrial Co., Ltd.

Suzhou VEICHI Electric Co., Ltd.

Han's Laser Technology Industry Group Co., Ltd.

HIGEN RNM Co., Ltd.

Key Questions Answered

1. How big is the global Hollow Shaft Torque Motor for Humanoid Robot market?
2. What is the demand of the global Hollow Shaft Torque Motor for Humanoid Robot market?
3. What is the year over year growth of the global Hollow Shaft Torque Motor for Humanoid Robot market?
4. What is the total value of the global Hollow Shaft Torque Motor for Humanoid Robot

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market?
5. Who are the Major Players in the global Hollow Shaft Torque Motor for Humanoid Robot market?
6. What are the growth factors driving the market demand?

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