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Global Hollow Shaft Torque Motor for Humanoid Robot Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Hollow Shaft Torque Motor for Humanoid Robot market size was valued at US$ 46.30 million in 2025 and is forecast to a readjusted size of US$ 292 million by 2032 with a CAGR of 24.8% during review period.

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.

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

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

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

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directly into the robot joint. Housed hollow shaft motors serve applications requiring 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-

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cogging control, thermal reliability and engineering support for demanding robot 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 is a detailed and comprehensive analysis for global Hollow Shaft Torque Motor for Humanoid Robot market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Motor Drive Technology and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Hollow Shaft Torque Motor for Humanoid Robot market size and forecasts, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global Hollow Shaft Torque Motor for Humanoid Robot market size and forecasts by region and country, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global Hollow Shaft Torque Motor for Humanoid Robot market size and forecasts, by Motor Drive Technology and by Application, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global Hollow Shaft Torque Motor for Humanoid Robot market shares of main players, shipments in revenue ($ Million), sales quantity (K Units), and ASP (US$/Unit),

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2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Hollow Shaft Torque Motor for Humanoid Robot

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Hollow Shaft Torque Motor for Humanoid Robot market based on the following parameters - company overview, sales quantity, revenue, 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.

Hollow Shaft Torque Motor for Humanoid Robot market is split by Motor Drive Technology and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Motor Drive Technology, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Motor Drive Technology

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Direct Drive Torque Motor

Brushless DC Torque Motor

Permanent Magnet Synchronous Torque Motor

Others

Market segment by Motor Outer Diameter

Up to 50 mm

Above 50 mm to 80 mm

Above 80 mm to 120 mm

Above 120 mm

Market segment 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

Market segment by Application

Lower Limb Joints

Upper Limb Joints

Torso and Waist Joints

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Head and Neck Joints

Others

Major players covered

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.

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.

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Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Hollow Shaft Torque Motor for Humanoid Robot product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Hollow Shaft Torque Motor for Humanoid Robot, with price, sales quantity, revenue, and global market share of Hollow Shaft Torque Motor for Humanoid Robot from 2021 to 2026.

Chapter 3, the Hollow Shaft Torque Motor for Humanoid Robot competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Hollow Shaft Torque Motor for Humanoid Robot breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Motor Drive Technology and by Application, with sales market share and growth rate by Motor Drive Technology, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales

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quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Hollow Shaft Torque Motor for Humanoid Robot market forecast, by regions, by Motor Drive Technology, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Hollow Shaft Torque Motor for Humanoid Robot.

Chapter 14 and 15, to describe Hollow Shaft Torque Motor for Humanoid Robot sales channel, distributors, customers, research findings and conclusion.

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