

Global Industrial Frameless Servo Motor Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G9849D45CCB5EN.html>

Date: August 2026

Pages: 138

Price: US\$ 3,480.00 (Single User License)

ID: G9849D45CCB5EN

Abstracts

According to our (Global Info Research) latest study, the global Industrial Frameless Servo Motor market size was valued at US\$ 1056 million in 2025 and is forecast to a readjusted size of US\$ 1925 million by 2032 with a CAGR of 8.8% during review period.

Industrial frameless servo motors consist primarily of separate stator and rotor components, eliminating the housing, bearings, and output shafts found in traditional motors. By driving the load directly (direct drive), they achieve exceptional responsiveness and precision while effectively reducing equipment size and weight; consequently, they are widely used in robotic joints, medical devices, and precision rotary tables. In 2025, global Industrial Frameless Servo Motor production reached approximately 3664 k units, with an average global market price of around 280 US\$/Unit. The production capacity of Industrial Frameless Servo Motor reaches 4880 k units, and the industry's gross profit margin is approximately between 30% and 50%.

The upstream segment of the industrial frameless servo motor industry chain primarily comprises suppliers of core raw materials and components, such as high-performance permanent magnet materials (e.g., NdFeB), silicon steel sheets, enameled wire, bearings, insulation materials, Hall sensors/encoders, precision machined parts, and magnet assemblies. The midstream consists of R&D and manufacturing enterprises responsible for electromagnetic design, precision manufacturing, rotor and stator assembly, performance testing, and system integration with components like servo drives and encoders. The downstream segment encompasses a wide range of applications, including industrial robots, humanoid robots, medical equipment, semiconductor manufacturing equipment, aerospace, precision automation equipment, and military hardware.

Driven by the rapid development of industrial automation, the robotics industry, and intelligent equipment, the market for frameless servo motors is experiencing sustained growth. The increasing demand for compact drive systems?characterized by high power density, high torque, and rapid dynamic response?across sectors such as collaborative robots, humanoid robots, medical robotics, semiconductor equipment, aerospace, and precision automation is driving the gradual replacement of traditional servo motor and gear-reduction drive solutions with frameless motors. Concurrently, continuous advancements in permanent magnet materials, high-performance magnets, precision winding techniques, motor control algorithms, and high-performance servo drive technologies have enhanced the efficiency, power density, positioning accuracy, thermal performance, and reliability of frameless motors, making them increasingly suitable for integration into robot joints and direct-drive systems. As the industrialization of humanoid robots accelerates, smart manufacturing upgrades, and the localization of high-end equipment advances, frameless servo motors are evolving toward higher torque density, lightweight designs, modularity, integration, and customization, with market demand projected to continue growing rapidly.

This report is a detailed and comprehensive analysis for global Industrial Frameless Servo Motor market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type 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 Industrial Frameless Servo Motor market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Industrial Frameless Servo Motor 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 Industrial Frameless Servo Motor market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Industrial Frameless Servo Motor market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 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 Industrial Frameless Servo Motor

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 Industrial Frameless Servo Motor 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 Kollmorgen, Parker Hannifin, Tecnotion, TQ-RoboDrive, ETEL SA, Allied Motion, Novanta, Moog, Oriental Motor, Maxon Motor, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Industrial Frameless Servo Motor market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Frameless Inner-Rotor Motor

Frameless Outer-Rotor Motor

Market segment by Power

?500W

500?1000W

>1000W

Market segment by Application

Industrial Robots

Medical Equipment

Aerospace

Semiconductor Equipment

Others

Major players covered

Kollmorgen

Parker Hannifin

Tecnotion

TQ-RoboDrive

ETEL SA

Allied Motion

Novanta

Moog

Oriental Motor

Maxon Motor

Portescap

Nidec

Inovance

Leadshine

Kinco

Zhejiang Hechuan Technology

VEICHI

Wolong Electric

CubeMars

Jiangsu Fulling Motor Technology

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Industrial Frameless Servo Motor product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Industrial Frameless Servo Motor, with price, sales quantity, revenue, and global market share of Industrial Frameless Servo Motor from 2021 to 2026.

Chapter 3, the Industrial Frameless Servo Motor competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Industrial Frameless Servo Motor 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 Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Industrial Frameless Servo Motor market forecast, by regions, by Type, 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 Industrial Frameless Servo Motor.

Chapter 14 and 15, to describe Industrial Frameless Servo Motor sales channel, distributors, customers, research findings and conclusion.

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