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Global Rotary Actuators for Robotics Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Rotary Actuators for Robotics market size is expected to reach $ 6302 million by 2032, rising at a market growth of 13.9% CAGR during the forecast period (2026-2032).

Rotary actuators for robotics are mechatronic motion units designed for robot joints and rotary axes, with controlled angular displacement and torque output as their core functions. A typical unit combines a brushless servo motor with a strain-wave, planetary, cycloidal, or direct-drive transmission architecture, together with bearings, encoders, and optional integrated drives, brakes, and torque sensors. Products are available in hollow-shaft and non-hollow-shaft configurations and generally support closed-loop position, velocity, and torque control through interfaces such as CAN or EtherCAT. This study focuses on rotary actuators procured as independent units for joints in industrial robots, mobile robots, medical and rehabilitation robots, commercial service robots, and special-purpose robotic systems. Key purchasing and engineering parameters include peak and rated torque, torque density, backlash, efficiency, speed, positioning accuracy, thermal capability, reliability, and integration level. The market sits at the intersection of precision gearing, servo motors, sensing, and motion control, with an estimated industry-wide comprehensive gross margin of approximately 38%.

Market Trends

Rotary actuators for robotics are shifting from separately sourced motors, reducers, and encoders toward highly integrated joint modules. Hollow cable routing, dual encoders, torque sensing, brakes, motor drives, and communications are increasingly combined in compact housings. Low-ratio planetary and quasi-direct-drive architectures are gaining

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ground in dynamic mobile and humanoid robots, while strain-wave designs retain an advantage in precision joints requiring low backlash and high reduction ratios. Higher torque density, lower mass and inertia, improved thermal management, and support for real-time buses such as CAN FD and EtherCAT are becoming the main directions of product development.

Drivers

Upgrades in manufacturing automation, rising labor costs, expansion of warehouse and logistics robots, and development of embodied-AI and humanoid platforms are expanding demand for joint actuation. Standardized rotary actuators reduce duplicated motor, gearbox, sensing, and controller development for robot OEMs and can shorten prototype iteration and volume-production introduction cycles.

Restraints

Precision reducers, thin-section bearings, high-performance magnetic materials, encoders, and torque sensors remain meaningful cost contributors. The tradeoff between high torque and low mass also complicates thermal design and lifetime validation. Some high-end applications require lengthy reliability, functional-safety, and certification processes, slowing entry by newer suppliers.

Opportunities

Humanoid robots, mobile manipulators, warehouse handling robots, rehabilitation and surgical robots, and outdoor inspection robots are creating new demand for modular joints. Actuator platforms with standardized mechanical interfaces, common communications, and scalable control software are better positioned for reuse across multiple robot models and higher-volume procurement.

Challenges

Gear life, backlash retention, bearing stiffness, and thermal derating under high-speed impact and frequent reversing loads remain core engineering challenges. As robot OEMs increase vertical integration, independent suppliers must sustain differentiation across torque density, control algorithms, reliability validation, interface ecosystems,

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and manufacturing cost.

Industry Chain Analysis

Upstream inputs include permanent-magnet materials, copper and electrical steel, frameless and servo motors, strain-wave, planetary and cycloidal reducers, precision bearings, encoders, torque sensors, power electronics and controllers, brakes, and structural components. Midstream suppliers integrate mechanical, motor, sensing, and drive-control systems and perform assembly, calibration, and lifetime testing. Downstream customers include industrial robot, mobile robot, medical and rehabilitation robot, commercial service robot, and special-purpose robot manufacturers and system integrators. Value is concentrated in precision transmission, motor power density, sensing and control, thermal management, and production consistency, while scale manufacturing is critical to cost competitiveness in the midrange market.

Segment Insights

By transmission type, planetary and low-ratio architectures are well suited to legged and mobile joints requiring impact tolerance, high dynamics, and backdrivability. Strain-wave designs remain strong in compact, low-backlash, high-ratio joints; cycloidal designs favor higher load and rigidity; and direct-drive designs offer low backlash and fast response but place greater demands on motor size, continuous torque, and cooling. Torque classes separate small distal joints from arm, leg, waist, and heavy industrial axes, while hollow-shaft and integrated-drive configurations continue to gain adoption.

Downstream Market Opportunities

Manufacturing and industrial automation retain the largest installed base and stable replacement demand, while logistics and warehousing add growth from mobile manipulation, sorting, and material handling systems with stronger requirements for impact tolerance and cost. Healthcare and rehabilitation applications place greater emphasis on low noise, smooth motion, safety redundancy, and certification, while commercial services and defense and public safety applications value lightweight construction, environmental robustness, and serviceability, creating differentiated higher-value opportunities.

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Regional Insights

Asia-Pacific is the most concentrated region for robot manufacturing and new deployments. China combines large robot production volumes, a broad component supply chain, and active investment in humanoid robotics, while Japan and South Korea have strong foundations in precision motion components and robot manufacturing. Europe emphasizes high-precision industrial automation, collaborative robotics, medical equipment, and functional safety, while North America remains active in AI robotics, warehouse automation, and new mobile and humanoid platforms. Supply-chain localization and regional volume-production capability will increasingly affect customer qualification.

Competitive Landscape Analysis

Competition is led by two broad supplier groups: established motion-control companies with deep expertise in precision gearing, servo motors, and industrial reliability, and integrated-actuator specialists built around modular robotics. Established suppliers are stronger in lifetime performance, precision, and industrial qualification, while specialists tend to compete on integration, software interfaces, fast iteration, and cost. Future differentiation will center on torque density, backlash, efficiency, thermal performance, lifetime, safety functions, communications compatibility, and volume pricing, while increasing vertical integration by robot OEMs will pressure standalone actuator suppliers to deliver clearer system-level value.

Report Scope

This report studies the global Rotary Actuators for Robotics production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Rotary Actuators for Robotics 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 Rotary Actuators for Robotics that contribute to its increasing demand across many markets.

Highlights and key features of the study

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Global Rotary Actuators for Robotics total production and demand, 2021-2032, (Units)

Global Rotary Actuators for Robotics total production value, 2021-2032, (USD Million)

Global Rotary Actuators for Robotics production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Rotary Actuators for Robotics consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Rotary Actuators for Robotics domestic production, consumption, key domestic manufacturers and share

Global Rotary Actuators for Robotics production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Rotary Actuators for Robotics production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Rotary Actuators for Robotics production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Rotary Actuators for Robotics 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 Harmonic Drive Systems, Nabtesco, Nidec Drive Technology, Maxon, ROBOTIS, HEBI Robotics, Wittenstein, Synapticon, MAB Robotics, Nanchang Kude Intelligent Technology, 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 Rotary Actuators for Robotics market

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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 Rotary Actuators for Robotics Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Rotary Actuators for Robotics Market, Segmentation by Type:

Strain-Wave Actuators

Planetary Gear Actuators

Cycloidal Gear Actuators

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Direct-Drive Actuators

Other Actuators

Global Rotary Actuators for Robotics Market, Segmentation by Peak Torque:

?20 Nm

>20–50 Nm

>50–100 Nm

>100 Nm

Global Rotary Actuators for Robotics Market, Segmentation by Center Bore:

Hollow-Shaft Actuators

Non-Hollow-Shaft Actuators

Global Rotary Actuators for Robotics Market, Segmentation by Drive Integration:

Integrated-Drive Actuators

External-Drive Actuators

Global Rotary Actuators for Robotics Market, Segmentation by Application:

Manufacturing and Industrial Automation

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Logistics and Warehousing

Healthcare and Rehabilitation

Commercial Services

Defense and Public Safety

Others

Companies Profiled:

Harmonic Drive Systems

Nabtesco

Nidec Drive Technology

Maxon

ROBOTIS

HEBI Robotics

Wittenstein

Synapticon

MAB Robotics

Nanchang Kude Intelligent Technology

Suzhou Micro Actuator Technology

RobStride Dynamics

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Oriental Motor

Key Questions Answered

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

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