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Global Superconducting Motor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Superconducting Motor market size is expected to reach $ 547 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

Superconducting Motor refers to an electric motor that applies superconducting materials to key electromagnetic components to achieve substantially higher current density, magnetic-field strength and power density than conventional conductor-based motor architectures under cryogenic operating conditions. Depending on superconducting material and operating temperature, the market is classified into High-Temperature Superconducting Motor and Low-Temperature Superconducting Motor. Typical systems integrate superconducting windings or magnetic components, a cryogenic cooling subsystem, rotor and stator assemblies, power electronics, thermal insulation and control equipment. Important performance parameters include rated power, power density, torque density, operating speed, efficiency, cooling temperature, superconducting critical-current margin, system mass and thermal-management requirements. Superconducting Motor technology is particularly relevant to applications where conventional motors face significant weight, volume or efficiency limitations at high power levels. The research scope focuses on complete superconducting motor systems and related integrated motor technologies developed for Aircraft Electric Propulsion, Marine Electric Propulsion, Urban Air Mobility, High-Power Industrial Drives, Advanced Transportation Systems and Research and Demonstration Systems.

Key Findings

High-Temperature Superconducting Motor represents the principal technical direction in current mobility-oriented development

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Megawatt-class Superconducting Motor development is increasingly concentrated on high-power electric propulsion

Aircraft Electric Propulsion is becoming a strategically important commercialization pathway for Superconducting Motor

Marine Electric Propulsion remains an important application for very-high-power superconducting motor technology

Cryogenic system integration is a decisive factor in overall Superconducting Motor performance

Market Trends

Superconducting Motor technology is advancing from laboratory-scale electromagnetic validation toward megawatt-class integrated propulsion demonstrators, with the development emphasis shifting from proving superconducting material performance toward improving complete-system power density, reliability and thermal integration. A major technical direction is the use of high-temperature superconducting materials to reduce electrical resistance and enable stronger electromagnetic loading while limiting the mass and volume of active motor components. At the same time, motor development is becoming increasingly integrated with cryogenic cooling, power electronics and propulsion-system design rather than treating the motor as an isolated component. Mobility applications are particularly important because weight and volume savings can translate directly into improved vehicle payload, range and energy efficiency. Recent two-megawatt-class aviation programs also demonstrate growing interest in combining superconducting propulsion with cryogenic hydrogen systems, allowing the low-temperature infrastructure required by hydrogen-powered aircraft to support electrical propulsion cooling. In parallel, very-high-power marine propulsion remains a technically relevant field because superconducting motors can reduce machinery volume and mass at multi-megawatt ratings. The long-term industry direction is therefore toward higher power density, lighter integrated systems, improved cooling efficiency, stronger fault tolerance and engineering architectures that can operate reliably in demanding transportation and industrial environments.

Market Dynamics

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Drivers

The fundamental driver for Superconducting Motor development is the increasing demand for electric propulsion systems that combine very high output power with stringent restrictions on weight, volume and energy consumption. Conventional electric motors can achieve high efficiency, but as power requirements rise into the megawatt and multi-megawatt range, electromagnetic loading, thermal dissipation and material mass increasingly constrain further improvements in power density. Superconducting technology provides a potential pathway to increase magnetic-field strength and current density while reducing active-material volume, making it particularly attractive for aircraft, ships and other high-power mobility systems. Electrification of aviation and marine propulsion is strengthening this technology pull, while hydrogen-based aircraft concepts create additional synergies because cryogenic fuel can potentially be integrated with the thermal-management architecture required by superconducting components. Toshiba has demonstrated a two-megawatt-class superconducting motor prototype targeted at mobility applications, while Airbus is developing a two-megawatt-class superconducting electric propulsion demonstrator, indicating that system-level engineering has progressed beyond small laboratory motors in selected applications. Demand for compact high-power drives in advanced industrial and transportation systems provides a further development driver where system footprint or weight carries significant economic value.

Restraints

The principal restraints arise from cryogenic-system complexity, high superconducting-material and manufacturing costs, demanding system engineering and the limited maturity of large-scale commercial production. A Superconducting Motor does not achieve its performance advantage through the electromagnetic structure alone; it also requires refrigeration equipment, thermal insulation, cryogenic fluid management or cryocoolers, specialized current leads and protection systems. These auxiliary components add mass, cost, parasitic power consumption and maintenance requirements, partially offsetting the advantages achieved by the superconducting motor itself. Superconducting materials must also operate within defined temperature, magnetic-field and current limits, making quench prevention and protection important design considerations. For transport applications, vibration, acceleration, repeated thermal cycling and compact installation impose additional engineering constraints. Manufacturing superconducting windings with consistent performance and mechanically securing them against large electromagnetic forces remain specialized processes with

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lower industrial maturity than conventional copper-wound motors. Consequently, the economic case for Superconducting Motor remains strongest where reductions in weight and volume or increases in power density generate sufficient system-level value to compensate for cryogenic and manufacturing costs.

Opportunities

The most significant opportunity lies in applications where system-level power density has greater value than minimum component cost. Aircraft Electric Propulsion is particularly important because motor mass directly affects aircraft payload, range and propulsion-system efficiency, and future hydrogen-powered aircraft may provide an integrated cryogenic environment favorable to superconducting propulsion architectures. Current industry programs targeting approximately two-megawatt-class superconducting motors demonstrate the potential pathway toward propulsion systems for larger electrified aircraft. Urban Air Mobility may create a longer-term opportunity as vehicle designers seek lightweight propulsion systems with high continuous and peak power, although commercialization will depend on simplifying cooling and meeting stringent aviation reliability requirements. Marine Electric Propulsion also provides opportunities at substantially higher power levels, where reductions in propulsion-motor size and mass can free valuable vessel space and improve platform configuration; previous full-power testing of a 36.5-megawatt high-temperature superconducting ship propulsion motor demonstrated the scalability of the technology to very-high-power applications. Beyond transportation, high-power industrial drives and specialized research systems may provide earlier niche opportunities where compactness, magnetic performance or operating efficiency justify premium system costs.

Challenges

The major challenge for the industry is converting strong motor-level performance into a reliable and economically competitive complete propulsion or drive system. The performance comparison with conventional motors must account not only for motor efficiency and mass but also for cryogenic refrigeration, insulation, pumps, heat exchangers, power electronics, protection hardware and control systems. Reliability requirements are particularly demanding in aircraft and marine applications, where failure of cooling equipment can affect superconducting operating conditions and propulsion availability. Thermal management also becomes increasingly difficult as systems move to higher power, because even relatively small heat loads at cryogenic temperatures can require substantial refrigeration input. Another challenge is the

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absence of a broadly standardized architecture across superconducting materials, winding configurations, cooling media and operating temperatures, meaning suppliers must often develop highly application-specific systems. Qualification cycles are expected to remain long in safety-critical transportation markets. In addition, conventional permanent-magnet and advanced induction or synchronous motors continue to improve in power density and cooling performance, raising the performance threshold that Superconducting Motor technology must exceed to justify additional complexity. Successful commercialization therefore depends on demonstrating a clear system-level advantage rather than superconducting performance alone.

Industry Chain Analysis

The upstream segment of the Superconducting Motor industry includes superconducting tapes, wires and conductors, substrate and stabilizer materials, insulation systems, structural alloys, magnetic materials, cryogenic equipment, bearings, power-electronic components, sensors and specialized manufacturing equipment. High-temperature superconducting tape represents a particularly important material input for many emerging motor architectures because its critical-current capability directly influences winding design and achievable electromagnetic loading. Cryogenic equipment is another critical upstream element, covering cryocoolers, liquid-gas circulation systems, heat exchangers, vacuum insulation and temperature-control components. Compared with conventional motor manufacturing, upstream material qualification is more demanding because superconducting performance can vary with temperature, magnetic-field orientation and mechanical strain, while winding fabrication must protect superconducting conductors against damage during manufacturing and operation.

The midstream consists of electromagnetic design, superconducting-coil manufacturing, rotor and stator integration, cryogenic-system development, power-electronic integration, protection and control engineering, testing and full-system validation. Value creation is concentrated in the ability to optimize the entire motor and cooling architecture rather than simply sourcing superconducting material. Downstream demand originates from Aircraft Electric Propulsion, Marine Electric Propulsion, Urban Air Mobility, High-Power Industrial Drives, Advanced Transportation Systems and Research and Demonstration Systems. Because many applications remain in prototype, demonstrator or early engineering stages, the current value chain has relatively high research, engineering and testing intensity. As commercialization progresses, manufacturing yield, superconducting-material utilization, cooling-system

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standardization and maintenance requirements will become increasingly important determinants of system cost and profitability.

Segment Insights

High-Temperature Superconducting Motor represents the more active development direction within the confirmed product segmentation because high-temperature superconducting materials can operate at temperatures considerably above those required by traditional low-temperature superconductors, potentially reducing the burden of cryogenic refrigeration and expanding the range of practical cooling architectures. Current mobility-focused development demonstrates that high-temperature superconducting technology can support megawatt-class motor designs while targeting significant reductions in size and weight relative to conventional high-power machines. Toshiba has reported a two-megawatt-class prototype for mobility applications with a target architecture substantially smaller and lighter than a conventional motor of comparable output, illustrating the power-density objective driving this segment. High-Temperature Superconducting Motor therefore has particularly strong relevance to aircraft, marine and other mobile platforms where mass and installation volume have direct system-level value.

Low-Temperature Superconducting Motor remains technologically relevant where extremely high magnetic fields or specific superconducting materials and cooling environments provide system advantages. The segment may benefit from applications in which low-temperature refrigeration is already available as part of the broader system, reducing the incremental cooling burden. However, lower operating temperatures generally increase thermal-management complexity and make application economics more dependent on system integration. Across both product types, future competitive performance will be determined by the combined relationship among power density, efficiency, cooling power, superconducting-material usage, operating temperature, reliability and total installed system mass rather than by motor electromagnetic efficiency alone.

Downstream Market Opportunities

Aircraft Electric Propulsion represents one of the most strategically important downstream opportunities because electrified aircraft require exceptionally high motor power density while imposing strict limitations on propulsion-system mass. The combination of superconducting motors and cryogenic hydrogen architectures provides a distinctive development pathway for future hydrogen-electric aircraft. Marine Electric

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Propulsion offers another important opportunity at higher power ratings, particularly for vessels where propulsion machinery weight and space materially affect platform design. Urban Air Mobility can benefit from compact high-power propulsion technology if refrigeration systems can be sufficiently simplified and lightweight. High-Power Industrial Drives and Advanced Transportation Systems provide additional opportunities where conventional motors become difficult to scale without substantial increases in size or cooling requirements. Research and Demonstration Systems will remain important in the near term because they provide the operating data required to validate superconducting coils, cryogenic systems, high-speed rotors and integrated power electronics before widespread commercial deployment. The downstream opportunity is therefore characterized by a progression from technology demonstration toward selected high-value applications where system-level weight, volume and power-density benefits justify the additional complexity.

Regional Insights

Japan is an important technology-development region for Superconducting Motor, supported by established capabilities in superconducting materials, cryogenic engineering, rotating machinery and advanced transportation systems. Development activities include megawatt-class mobility motors and international cooperation targeting future aircraft propulsion, giving the country a notable position in system engineering and component technology. Europe is another important development center, particularly in aerospace electrification and hydrogen-powered aircraft research. European programs are increasingly evaluating superconducting motors as part of complete cryogenic electric-propulsion architectures rather than as standalone machines, strengthening the connection between aerospace, hydrogen and superconducting technology development.

The United States has accumulated experience in high-temperature superconducting motor technology for marine and defense-related propulsion, including very-high-power ship propulsion demonstrations, while emerging companies are also exploring lightweight superconducting machines for advanced electric aviation. China is developing a broader domestic superconducting ecosystem encompassing superconducting materials, cryogenic technologies and high-power electrical equipment, creating conditions for future localization of Superconducting Motor systems in transportation and industrial applications. South Korea also participates through specialized superconducting technology development. Regional competition remains primarily technology- and project-driven rather than volume-driven, with Japan, Europe

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and the United States showing strong system-demonstration capabilities and China offering increasing potential from its superconducting-material and advanced-equipment industrial base.

Competitive Landscape Analysis

The Superconducting Motor market remains an emerging technology-oriented competitive field characterized by a limited number of specialized participants, long development cycles and close interaction between superconducting-material expertise, rotating-machine engineering and downstream system developers. Competition is not primarily based on standardized motor pricing or mass-production scale at the current stage; instead, differentiation is centered on achievable power density, superconducting winding technology, cooling architecture, rotor dynamics, electromagnetic design, system mass, operating reliability and integration with propulsion or industrial platforms. Some participants possess long-term expertise in superconducting materials and high-power electrical machinery, while others are positioned around aerospace propulsion, cryogenic systems or specialized motor engineering. Collaborative development between motor-technology companies and downstream aircraft or transportation developers is becoming particularly important because optimizing a Superconducting Motor independently from the vehicle cooling, fuel and electrical systems can limit its system-level value. Intellectual property, proprietary coil designs, cryogenic integration capability and accumulated demonstration data therefore represent significant competitive barriers. As the market progresses toward commercialization, the competitive focus is expected to shift gradually from prototype power output toward manufacturability, reliability, certification, maintenance, lifecycle cost and repeatable series production, while companies capable of combining superconducting technology with complete propulsion-system engineering are likely to hold stronger strategic positions.

Report Scope

This report studies the global Superconducting Motor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Superconducting Motor and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends

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and competition, as well as details the characteristics of Superconducting Motor that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Superconducting Motor total production and demand, 2021-2032, (K Units)

Global Superconducting Motor total production value, 2021-2032, (USD Million)

Global Superconducting Motor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Superconducting Motor consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Superconducting Motor domestic production, consumption, key domestic manufacturers and share

Global Superconducting Motor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Superconducting Motor production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Superconducting Motor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Superconducting Motor 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 Toshiba Energy Systems & Solutions Corporation, Airbus SE, SuperGenics Co., Ltd., IMRA Japan Co., Ltd., KITANO SEIKI CO., LTD., Shanghai Superconducting Technology, Guangneng Yineng (Beijing) Nuclear Energy Technology, Beijing Intronic Superconducting Technology Co., Ltd., American Superconductor Corporation (AMSC), Hinetics LLC, etc.

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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 Superconducting Motor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Units) and average price (K 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 Superconducting Motor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Superconducting Motor Market, Segmentation by Type:

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High-Temperature Superconducting Motor

Low-Temperature Superconducting Motor

Global Superconducting Motor Market, Segmentation by Rated Power:

Below 100 kW

100 kW–1 MW

Above 1 MW

Global Superconducting Motor Market, Segmentation by Primary Cooling Method:

Liquid Nitrogen-Cooled Motor

Liquid Hydrogen-Cooled Motor

Helium-Cooled Motor

Cryocooler-Cooled Motor

Global Superconducting Motor Market, Segmentation by Application:

Aircraft Electric Propulsion

Marine Electric Propulsion

Urban Air Mobility

High-Power Industrial Drives

Advanced Transportation Systems

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Research and Demonstration Systems

Companies Profiled:

Toshiba Energy Systems & Solutions Corporation

Airbus SE

SuperGenics Co., Ltd.

IMRA Japan Co., Ltd.

KITANO SEIKI CO., LTD.

Shanghai Superconducting Technology

Guangneng Yineng (Beijing) Nuclear Energy Technology

Beijing Intronic Superconducting Technology Co., Ltd.

American Superconductor Corporation (AMSC)

Hinetics LLC

Key Questions Answered

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

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Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Superconducting Motor Production Value by Manufacturer (2021-2026)

+357 96 030922
info@marketpublishers.com

3.2 World Superconducting Motor Production by Manufacturer (2021-2026)
3.3 World Superconducting Motor Average Price by Manufacturer (2021-2026)
3.4 Superconducting Motor Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Superconducting Motor Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Superconducting Motor in 2025
  3.5.3 Global Concentration Ratios (CR8) for Superconducting Motor in 2025
3.6 Superconducting Motor Market: Overall Company Footprint Analysis
  3.6.1 Superconducting Motor Market: Region Footprint
  3.6.2 Superconducting Motor Market: Company Product Type Footprint
  3.6.3 Superconducting Motor 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: Superconducting Motor Production Value Comparison
  4.1.1 United States VS China: Superconducting Motor Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Superconducting Motor Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Superconducting Motor Production Comparison
  4.2.1 United States VS China: Superconducting Motor Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Superconducting Motor Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Superconducting Motor Consumption Comparison
  4.3.1 United States VS China: Superconducting Motor Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Superconducting Motor Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Superconducting Motor Manufacturers and Market Share, 2021-2026
  4.4.1 United States Based Superconducting Motor Manufacturers, Headquarters and Production Site (States, Country)

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

5 MARKET ANALYSIS BY TYPE

5.1 World Superconducting Motor Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 High-Temperature Superconducting Motor
5.2.2 Low-Temperature Superconducting Motor
5.3 Market Segment by Type
5.3.1 World Superconducting Motor Production by Type (2021-2032)
5.3.2 World Superconducting Motor Production Value by Type (2021-2032)
5.3.3 World Superconducting Motor Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY RATED POWER

6.1 World Superconducting Motor Market Size Overview by Rated Power: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Rated Power
6.2.1 Below 100 kW
6.2.2 100 kW–1 MW
6.2.3 Above 1 MW

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6.3 Market Segment by Rated Power
6.3.1 World Superconducting Motor Production by Rated Power (2021-2032)
6.3.2 World Superconducting Motor Production Value by Rated Power (2021-2032)
6.3.3 World Superconducting Motor Average Price by Rated Power (2021-2032)

7 MARKET ANALYSIS BY PRIMARY COOLING METHOD

7.1 World Superconducting Motor Market Size Overview by Primary Cooling Method: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Primary Cooling Method
7.2.1 Liquid Nitrogen-Cooled Motor
7.2.2 Liquid Hydrogen-Cooled Motor
7.2.3 Helium-Cooled Motor
7.2.4 Cryocooler-Cooled Motor
7.3 Market Segment by Primary Cooling Method
7.3.1 World Superconducting Motor Production by Primary Cooling Method (2021-2032)
7.3.2 World Superconducting Motor Production Value by Primary Cooling Method (2021-2032)
7.3.3 World Superconducting Motor Average Price by Primary Cooling Method (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Superconducting Motor Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Aircraft Electric Propulsion
8.2.2 Marine Electric Propulsion
8.2.3 Urban Air Mobility
8.2.4 High-Power Industrial Drives
8.2.5 Advanced Transportation Systems
8.2.6 Research and Demonstration Systems
8.3 Market Segment by Application
8.3.1 World Superconducting Motor Production by Application (2021-2032)
8.3.2 World Superconducting Motor Production Value by Application (2021-2032)
8.3.3 World Superconducting Motor Average Price by Application (2021-2032)

9 COMPANY PROFILES

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9.1 Toshiba Energy Systems & Solutions Corporation
9.1.1 Toshiba Energy Systems & Solutions Corporation Details
9.1.2 Toshiba Energy Systems & Solutions Corporation Major Business
9.1.3 Toshiba Energy Systems & Solutions Corporation Superconducting Motor Product and Services
9.1.4 Toshiba Energy Systems & Solutions Corporation Superconducting Motor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 Toshiba Energy Systems & Solutions Corporation Recent Developments/Updates
9.1.6 Toshiba Energy Systems & Solutions Corporation Competitive Strengths & Weaknesses
9.2 Airbus SE
9.2.1 Airbus SE Details
9.2.2 Airbus SE Major Business
9.2.3 Airbus SE Superconducting Motor Product and Services
9.2.4 Airbus SE Superconducting Motor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Airbus SE Recent Developments/Updates
9.2.6 Airbus SE Competitive Strengths & Weaknesses
9.3 SuperGenics Co., Ltd.
9.3.1 SuperGenics Co., Ltd. Details
9.3.2 SuperGenics Co., Ltd. Major Business
9.3.3 SuperGenics Co., Ltd. Superconducting Motor Product and Services
9.3.4 SuperGenics Co., Ltd. Superconducting Motor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 SuperGenics Co., Ltd. Recent Developments/Updates
9.3.6 SuperGenics Co., Ltd. Competitive Strengths & Weaknesses
9.4 IMRA Japan Co., Ltd.
9.4.1 IMRA Japan Co., Ltd. Details
9.4.2 IMRA Japan Co., Ltd. Major Business
9.4.3 IMRA Japan Co., Ltd. Superconducting Motor Product and Services
9.4.4 IMRA Japan Co., Ltd. Superconducting Motor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 IMRA Japan Co., Ltd. Recent Developments/Updates
9.4.6 IMRA Japan Co., Ltd. Competitive Strengths & Weaknesses
9.5 KITANO SEIKI CO., LTD.
9.5.1 KITANO SEIKI CO., LTD. Details
9.5.2 KITANO SEIKI CO., LTD. Major Business

+357 96 030922
info@marketpublishers.com

9.5.3 KITANO SEIKI CO., LTD. Superconducting Motor Product and Services
9.5.4 KITANO SEIKI CO., LTD. Superconducting Motor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 KITANO SEIKI CO., LTD. Recent Developments/Updates
9.5.6 KITANO SEIKI CO., LTD. Competitive Strengths & Weaknesses
9.6 Shanghai Superconducting Technology
9.6.1 Shanghai Superconducting Technology Details
9.6.2 Shanghai Superconducting Technology Major Business
9.6.3 Shanghai Superconducting Technology Superconducting Motor Product and Services
9.6.4 Shanghai Superconducting Technology Superconducting Motor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Shanghai Superconducting Technology Recent Developments/Updates
9.6.6 Shanghai Superconducting Technology Competitive Strengths & Weaknesses
9.7 Guangneng Yineng (Beijing) Nuclear Energy Technology
9.7.1 Guangneng Yineng (Beijing) Nuclear Energy Technology Details
9.7.2 Guangneng Yineng (Beijing) Nuclear Energy Technology Major Business
9.7.3 Guangneng Yineng (Beijing) Nuclear Energy Technology Superconducting Motor Product and Services
9.7.4 Guangneng Yineng (Beijing) Nuclear Energy Technology Superconducting Motor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Guangneng Yineng (Beijing) Nuclear Energy Technology Recent Developments/Updates
9.7.6 Guangneng Yineng (Beijing) Nuclear Energy Technology Competitive Strengths & Weaknesses
9.8 Beijing Intronic Superconducting Technology Co., Ltd.
9.8.1 Beijing Intronic Superconducting Technology Co., Ltd. Details
9.8.2 Beijing Intronic Superconducting Technology Co., Ltd. Major Business
9.8.3 Beijing Intronic Superconducting Technology Co., Ltd. Superconducting Motor Product and Services
9.8.4 Beijing Intronic Superconducting Technology Co., Ltd. Superconducting Motor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Beijing Intronic Superconducting Technology Co., Ltd. Recent Developments/Updates
9.8.6 Beijing Intronic Superconducting Technology Co., Ltd. Competitive Strengths & Weaknesses
9.9 American Superconductor Corporation (AMSC)
9.9.1 American Superconductor Corporation (AMSC) Details
9.9.2 American Superconductor Corporation (AMSC) Major Business

+357 96 030922
info@marketpublishers.com

9.9.3 American Superconductor Corporation (AMSC) Superconducting Motor Product and Services
9.9.4 American Superconductor Corporation (AMSC) Superconducting Motor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 American Superconductor Corporation (AMSC) Recent Developments/Updates
9.9.6 American Superconductor Corporation (AMSC) Competitive Strengths & Weaknesses
9.10 Hinetics LLC
9.10.1 Hinetics LLC Details
9.10.2 Hinetics LLC Major Business
9.10.3 Hinetics LLC Superconducting Motor Product and Services
9.10.4 Hinetics LLC Superconducting Motor Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.10.5 Hinetics LLC Recent Developments/Updates
9.10.6 Hinetics LLC Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Superconducting Motor Industry Chain
10.2 Superconducting Motor Upstream Analysis
10.2.1 Superconducting Motor Core Raw Materials
10.2.2 Main Manufacturers of Superconducting Motor Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Superconducting Motor Production Mode
10.6 Superconducting Motor Procurement Model
10.7 Superconducting Motor Industry Sales Model and Sales Channels
10.7.1 Superconducting Motor Sales Model
10.7.2 Superconducting Motor Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World Superconducting Motor Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Superconducting Motor Production Value by Region (2021-2026) & (USD Million)
Table 3. World Superconducting Motor Production Value by Region (2027-2032) & (USD Million)
Table 4. World Superconducting Motor Production Value Market Share by Region (2021-2026)
Table 5. World Superconducting Motor Production Value Market Share by Region (2027-2032)
Table 6. World Superconducting Motor Production by Region (2021-2026) & (K Units)
Table 7. World Superconducting Motor Production by Region (2027-2032) & (K Units)
Table 8. World Superconducting Motor Production Market Share by Region (2021-2026)
Table 9. World Superconducting Motor Production Market Share by Region (2027-2032)
Table 10. World Superconducting Motor Average Price by Region (2021-2026) & (K US$/Unit)
Table 11. World Superconducting Motor Average Price by Region (2027-2032) & (K US$/Unit)
Table 12. Superconducting Motor Major Market Trends
Table 13. World Superconducting Motor Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)
Table 14. World Superconducting Motor Consumption by Region (2021-2026) & (K Units)
Table 15. World Superconducting Motor Consumption Forecast by Region (2027-2032) & (K Units)
Table 16. World Superconducting Motor Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Superconducting Motor Producers in 2025
Table 18. World Superconducting Motor Production by Manufacturer (2021-2026) & (K Units)
Table 19. Production Market Share of Key Superconducting Motor Producers in 2025
Table 20. World Superconducting Motor Average Price by Manufacturer (2021-2026) & (K US$/Unit)
Table 21. Global Superconducting Motor Company Evaluation Quadrant

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Table 22. World Superconducting Motor Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Superconducting Motor Production Site of Key Manufacturer
Table 24. Superconducting Motor Market: Company Product Type Footprint
Table 25. Superconducting Motor Market: Company Product Application Footprint
Table 26. Superconducting Motor Competitive Factors
Table 27. Superconducting Motor New Entrant and Capacity Expansion Plans
Table 28. Superconducting Motor Mergers & Acquisitions Activity
Table 29. United States VS China Superconducting Motor Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Superconducting Motor Production Comparison, (2021 & 2025 & 2032) & (K Units)
Table 31. United States VS China Superconducting Motor Consumption Comparison, (2021 & 2025 & 2032) & (K Units)
Table 32. United States Based Superconducting Motor Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Superconducting Motor Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Superconducting Motor Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Superconducting Motor Production (2021-2026) & (K Units)
Table 36. United States Based Manufacturers Superconducting Motor Production Market Share (2021-2026)
Table 37. China Based Superconducting Motor Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Superconducting Motor Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Superconducting Motor Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Superconducting Motor Production, (2021-2026) & (K Units)
Table 41. China Based Manufacturers Superconducting Motor Production Market Share (2021-2026)
Table 42. Rest of World Based Superconducting Motor Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Superconducting Motor Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Superconducting Motor Production Value

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Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Superconducting Motor Production, (2021-2026) & (K Units)
Table 46. Rest of World Based Manufacturers Superconducting Motor Production Market Share (2021-2026)
Table 47. World Superconducting Motor Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Superconducting Motor Production by Type (2021-2026) & (K Units)
Table 49. World Superconducting Motor Production by Type (2027-2032) & (K Units)
Table 50. World Superconducting Motor Production Value by Type (2021-2026) & (USD Million)
Table 51. World Superconducting Motor Production Value by Type (2027-2032) & (USD Million)
Table 52. World Superconducting Motor Average Price by Type (2021-2026) & (K US$/Unit)
Table 53. World Superconducting Motor Average Price by Type (2027-2032) & (K US$/Unit)
Table 54. World Superconducting Motor Production Value by Rated Power, (USD Million), 2021 & 2025 & 2032
Table 55. World Superconducting Motor Production by Rated Power (2021-2026) & (K Units)
Table 56. World Superconducting Motor Production by Rated Power (2027-2032) & (K Units)
Table 57. World Superconducting Motor Production Value by Rated Power (2021-2026) & (USD Million)
Table 58. World Superconducting Motor Production Value by Rated Power (2027-2032) & (USD Million)
Table 59. World Superconducting Motor Average Price by Rated Power (2021-2026) & (K US$/Unit)
Table 60. World Superconducting Motor Average Price by Rated Power (2027-2032) & (K US$/Unit)
Table 61. World Superconducting Motor Production Value by Primary Cooling Method, (USD Million), 2021 & 2025 & 2032
Table 62. World Superconducting Motor Production by Primary Cooling Method (2021-2026) & (K Units)
Table 63. World Superconducting Motor Production by Primary Cooling Method (2027-2032) & (K Units)
Table 64. World Superconducting Motor Production Value by Primary Cooling Method (2021-2026) & (USD Million)

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Table 65. World Superconducting Motor Production Value by Primary Cooling Method (2027-2032) & (USD Million)
Table 66. World Superconducting Motor Average Price by Primary Cooling Method (2021-2026) & (K US$/Unit)
Table 67. World Superconducting Motor Average Price by Primary Cooling Method (2027-2032) & (K US$/Unit)
Table 68. World Superconducting Motor Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Superconducting Motor Production by Application (2021-2026) & (K Units)
Table 70. World Superconducting Motor Production by Application (2027-2032) & (K Units)
Table 71. World Superconducting Motor Production Value by Application (2021-2026) & (USD Million)
Table 72. World Superconducting Motor Production Value by Application (2027-2032) & (USD Million)
Table 73. World Superconducting Motor Average Price by Application (2021-2026) & (K US$/Unit)
Table 74. World Superconducting Motor Average Price by Application (2027-2032) & (K US$/Unit)
Table 75. Toshiba Energy Systems & Solutions Corporation Basic Information, Manufacturing Base and Competitors
Table 76. Toshiba Energy Systems & Solutions Corporation Major Business
Table 77. Toshiba Energy Systems & Solutions Corporation Superconducting Motor Product and Services
Table 78. Toshiba Energy Systems & Solutions Corporation Superconducting Motor Production (K Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Toshiba Energy Systems & Solutions Corporation Recent Developments/Updates
Table 80. Toshiba Energy Systems & Solutions Corporation Competitive Strengths & Weaknesses
Table 81. Airbus SE Basic Information, Manufacturing Base and Competitors
Table 82. Airbus SE Major Business
Table 83. Airbus SE Superconducting Motor Product and Services
Table 84. Airbus SE Superconducting Motor Production (K Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Airbus SE Recent Developments/Updates
Table 86. Airbus SE Competitive Strengths & Weaknesses

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Table 87. SuperGenics Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 88. SuperGenics Co., Ltd. Major Business
Table 89. SuperGenics Co., Ltd. Superconducting Motor Product and Services
Table 90. SuperGenics Co., Ltd. Superconducting Motor Production (K Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. SuperGenics Co., Ltd. Recent Developments/Updates
Table 92. SuperGenics Co., Ltd. Competitive Strengths & Weaknesses
Table 93. IMRA Japan Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 94. IMRA Japan Co., Ltd. Major Business
Table 95. IMRA Japan Co., Ltd. Superconducting Motor Product and Services
Table 96. IMRA Japan Co., Ltd. Superconducting Motor Production (K Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. IMRA Japan Co., Ltd. Recent Developments/Updates
Table 98. IMRA Japan Co., Ltd. Competitive Strengths & Weaknesses
Table 99. KITANO SEIKI CO., LTD. Basic Information, Manufacturing Base and Competitors
Table 100. KITANO SEIKI CO., LTD. Major Business
Table 101. KITANO SEIKI CO., LTD. Superconducting Motor Product and Services
Table 102. KITANO SEIKI CO., LTD. Superconducting Motor Production (K Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. KITANO SEIKI CO., LTD. Recent Developments/Updates
Table 104. KITANO SEIKI CO., LTD. Competitive Strengths & Weaknesses
Table 105. Shanghai Superconducting Technology Basic Information, Manufacturing Base and Competitors
Table 106. Shanghai Superconducting Technology Major Business
Table 107. Shanghai Superconducting Technology Superconducting Motor Product and Services
Table 108. Shanghai Superconducting Technology Superconducting Motor Production (K Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Shanghai Superconducting Technology Recent Developments/Updates
Table 110. Shanghai Superconducting Technology Competitive Strengths & Weaknesses
Table 111. Guangneng Yineng (Beijing) Nuclear Energy Technology Basic Information,

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Manufacturing Base and Competitors
Table 112. Guangneng Yineng (Beijing) Nuclear Energy Technology Major Business
Table 113. Guangneng Yineng (Beijing) Nuclear Energy Technology Superconducting Motor Product and Services
Table 114. Guangneng Yineng (Beijing) Nuclear Energy Technology Superconducting Motor Production (K Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Guangneng Yineng (Beijing) Nuclear Energy Technology Recent Developments/Updates
Table 116. Guangneng Yineng (Beijing) Nuclear Energy Technology Competitive Strengths & Weaknesses
Table 117. Beijing Intronic Superconducting Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 118. Beijing Intronic Superconducting Technology Co., Ltd. Major Business
Table 119. Beijing Intronic Superconducting Technology Co., Ltd. Superconducting Motor Product and Services
Table 120. Beijing Intronic Superconducting Technology Co., Ltd. Superconducting Motor Production (K Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Beijing Intronic Superconducting Technology Co., Ltd. Recent Developments/Updates
Table 122. Beijing Intronic Superconducting Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 123. American Superconductor Corporation (AMSC) Basic Information, Manufacturing Base and Competitors
Table 124. American Superconductor Corporation (AMSC) Major Business
Table 125. American Superconductor Corporation (AMSC) Superconducting Motor Product and Services
Table 126. American Superconductor Corporation (AMSC) Superconducting Motor Production (K Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. American Superconductor Corporation (AMSC) Recent Developments/Updates
Table 128. American Superconductor Corporation (AMSC) Competitive Strengths & Weaknesses
Table 129. Hinetics LLC Basic Information, Manufacturing Base and Competitors
Table 130. Hinetics LLC Major Business
Table 131. Hinetics LLC Superconducting Motor Product and Services
Table 132. Hinetics LLC Superconducting Motor Production (K Units), Price (K

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US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Hinetics LLC Recent Developments/Updates
Table 134. Hinetics LLC Competitive Strengths & Weaknesses
Table 135. Global Key Players of Superconducting Motor Upstream (Raw Materials)
Table 136. Global Superconducting Motor Typical Customers
Table 137. Superconducting Motor Typical Distributors

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List Of Figures

LIST OF FIGURES

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

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Figure 27. United States VS China: Superconducting Motor Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Superconducting Motor Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Superconducting Motor Production Market Share 2025
Figure 30. China Based Manufacturers Superconducting Motor Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Superconducting Motor Production Market Share 2025
Figure 32. World Superconducting Motor Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Superconducting Motor Production Value Market Share by Type in 2025
Figure 34. High-Temperature Superconducting Motor
Figure 35. Low-Temperature Superconducting Motor
Figure 36. World Superconducting Motor Production Market Share by Type (2021-2032)
Figure 37. World Superconducting Motor Production Value Market Share by Type (2021-2032)
Figure 38. World Superconducting Motor Average Price by Type (2021-2032) & (K US$/Unit)
Figure 39. World Superconducting Motor Production Value by Rated Power, (USD Million), 2021 & 2025 & 2032
Figure 40. World Superconducting Motor Production Value Market Share by Rated Power in 2025
Figure 41. Below 100 kW
Figure 42. 100 kW–1 MW
Figure 43. Above 1 MW
Figure 44. World Superconducting Motor Production Market Share by Rated Power (2021-2032)
Figure 45. World Superconducting Motor Production Value Market Share by Rated Power (2021-2032)
Figure 46. World Superconducting Motor Average Price by Rated Power (2021-2032) & (K US$/Unit)
Figure 47. World Superconducting Motor Production Value by Primary Cooling Method, (USD Million), 2021 & 2025 & 2032
Figure 48. World Superconducting Motor Production Value Market Share by Primary Cooling Method in 2025
Figure 49. Liquid Nitrogen-Cooled Motor

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Figure 50. Liquid Hydrogen-Cooled Motor
Figure 51. Helium-Cooled Motor
Figure 52. Cryocooler-Cooled Motor
Figure 53. World Superconducting Motor Production Market Share by Primary Cooling Method (2021-2032)
Figure 54. World Superconducting Motor Production Value Market Share by Primary Cooling Method (2021-2032)
Figure 55. World Superconducting Motor Average Price by Primary Cooling Method (2021-2032) & (K US$/Unit)
Figure 56. World Superconducting Motor Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 57. World Superconducting Motor Production Value Market Share by Application in 2025
Figure 58. Aircraft Electric Propulsion
Figure 59. Marine Electric Propulsion
Figure 60. Urban Air Mobility
Figure 61. High-Power Industrial Drives
Figure 62. Advanced Transportation Systems
Figure 63. Research and Demonstration Systems
Figure 64. World Superconducting Motor Production Market Share by Application (2021-2032)
Figure 65. World Superconducting Motor Production Value Market Share by Application (2021-2032)
Figure 66. World Superconducting Motor Average Price by Application (2021-2032) & (K US$/Unit)
Figure 67. Superconducting Motor Industry Chain
Figure 68. Superconducting Motor Procurement Model
Figure 69. Superconducting Motor Sales Model
Figure 70. Superconducting Motor Sales Channels, Direct Sales, and Distribution
Figure 71. Methodology
Figure 72. Research Process and Data Source

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