

Global Frameless Torque Motor Market Growth 2026-2032

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Abstracts

The global Frameless Torque Motor market size is predicted to grow from US\$ 786 million in 2025 to US\$ 1410 million in 2032; it is expected to grow at a CAGR of 8.7% from 2026 to 2032.

The frameless torque motor supports the rotor through the bearing of the mechanical equipment itself and can be directly embedded in the equipment, which greatly meets the design requirements of high integration. This type of motor has the characteristics of small size, light weight and high power, so it is especially suitable for integration into Mechanism components such as machinery, robotic joints, rotating parts and actuators.

Frameless torque motors are essentially stators and rotors directly embedded into the customer's mechanism. Supported by the equipment's own bearings, they output high torque and high bandwidth via direct drive, achieving higher torque density and a more compact joint/turntable structure within the same volume. The strongest demand for traction comes from three types of industrial scenarios: First, robot joints and high-end automation mechanisms. To reduce backlash, maintenance, and dynamic limitations caused by gearboxes, more and more solutions are shifting to direct drive/semi-direct drive and adopting frameless structures to integrate the motor into the structure. Second, semiconductors and precision equipment (such as turntables, alignment, and high-repeatability positioning mechanisms). Customers prioritize low cogging torque, thermal efficiency, and thermal drift control; direct-drive torque motors are a natural fit for these platforms that are sensitive to heat and micro-vibrations. Third, aerospace/military/optoelectronic pods and other high-reliability, miniaturized systems. Frameless direct drives facilitate customized mounting flanges, hollow shafts, and structural integration, and are also more conducive to sealing and impact-resistant designs in harsh environments.

The global supply landscape is broadly divided into two camps: ?standardized platforms from major motion control manufacturers? and ?high-performance series from specialized direct drive manufacturers.? Motion control companies like Kollmorgen offer a wide range of standard specifications through their KBM series and support rapid customization of windings, leads, and stack thicknesses, making them suitable for equipment manufacturers seeking stable supply, engineering support, and scalable deployment. On the other hand, specialized direct drive manufacturers like Tecnotion and ETEL emphasize the ultimate in ?torque density, low cogging, and thermal design,? making them highly sought after in semiconductors, life sciences, and high-end machine tools/rotary stages. For example, Tecnotion's QTR series highlights ultra-thinness, high torque density, low thermal resistance, and low cogging, explicitly targeting applications in semiconductors, robotics, and factory automation. ETEL also uses low cogging and thermal efficiency as core selling points for its precision equipment. Meanwhile, manufacturers like Moog have differentiated themselves in the areas of ?robot joints (including hollow shaft kits)? and ?aerospace and military direct drive?: Moog positions its frameless direct drive motors for multiple scenarios in military, aerospace, and industrial applications, building a high-end barrier with indicators such as high linearity and low electrical time constant.

In the next 3-5 years, the product evolution of frameless torque motors will revolve around ?higher torque density + lower loss and thermal drift + easier integration?: on the one hand, the structure will continue to move towards ultra-thinness, larger inner diameter, and lower cogging/lower harmonics (reducing micro-vibration and velocity ripple), while strengthening the heat conduction path and packaging process to improve continuous torque capability; Tecnotion has already made ?ultra-thin, high torque density, low thermal resistance, low cogging/low THD? directional features in its series, and ETEL also emphasizes the importance of low cogging and high thermal efficiency for precision equipment. On the other hand, competition will accelerate its shift from ?selling motors? to ?selling deliverable joint/turntable-level solutions?: frameless motors are packaged with encoders, brakes, actuators, thermal management, and assembly tolerance guidelines, reducing the engineering risks for customers from prototype to mass production; Kollmorgen and others have emphasized the embedded integration of frameless motors and engineering methods for robot joints/compact actuators in their public materials. The most important incremental track will come from the upgrade and iteration of higher-degree-of-freedom robots (including humanoid/collaborative) and semiconductor devices: TQ's case materials show that its ILM frameless kit has been used in humanoid robot joint design, reflecting that the ?high torque density + compact integration? approach is entering a wider range of robot forms.

LP Information, Inc. (LPI) ' newest research report, the "Frameless Torque Motor Industry Forecast" looks at past sales and reviews total world Frameless Torque Motor sales in 2025, providing a comprehensive analysis by region and market sector of projected Frameless Torque Motor sales for 2026 through 2032. With Frameless Torque Motor sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Frameless Torque Motor industry.

This Insight Report provides a comprehensive analysis of the global Frameless Torque Motor landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Frameless Torque Motor portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Frameless Torque Motor market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Frameless Torque Motor and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Frameless Torque Motor.

This report presents a comprehensive overview, market shares, and growth opportunities of Frameless Torque Motor market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Diameter<100mm

Diameter 100-200mm

Diameter>200mm

Segmentation by Feature:

Frameless Outrunner Motor

Frameless Intrunner Motor

Segmentation by Application:

Food and Packaging Industry

Robotics

Semiconductor

Machine Tool

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Kollmorgen

Maxon Group

Allient

Magnetic Innovations

Alva

Lin Engineering

Johnson Electric

Tecnotion

Nidec

Pranshu Electricals

Motion Control Products

Alxion

Moog

Agito Akribis

Rozum Robotics

Icpe

Parker

Novanta

Sensata Technologies

Leaderdrive

Shenzhen Mosrac Motor

CubeMars

ETEL

TQ Group

Key Questions Addressed in this Report

What is the 10-year outlook for the global Frameless Torque Motor market?

What factors are driving Frameless Torque Motor market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Frameless Torque Motor market opportunities vary by end market size?

How does Frameless Torque Motor break out by Type, by Application?

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