

Global Frameless Torque Motors Market Growth 2026-2032

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Abstracts

The global Frameless Torque Motors market size is predicted to grow from US\$ 699 million in 2025 to US\$ 1375 million in 2032; it is expected to grow at a CAGR of 10.2% from 2026 to 2032.

Frameless torque motors are high-torque-density rotary drive units based mainly on permanent-magnet synchronous or brushless DC electromagnetic designs. They are supplied primarily as active stator and permanent-magnet rotor components, while the OEM integrates the shaft, bearings, housing, encoder, and thermal structure into the machine. This study focuses on frameless torque motors used in direct-drive or low-reduction-ratio servo systems. Typical purchasing parameters include continuous and peak torque, stator outer diameter, hollow-bore diameter, axial length, rated voltage, speed, torque constant, cogging torque, and cooling conditions. Their value lies in eliminating a standalone motor housing and reducing transmission elements, thereby improving torque per unit volume and weight, integration flexibility, dynamic response, and motion smoothness. Major end markets include robotics, semiconductor equipment, machine tools, medical and life science equipment, aerospace and defense, and other precision industrial equipment. Major cost inputs include copper, electrical steel, rare-earth permanent magnets, insulation and potting materials, and precision manufacturing and testing. Key technical barriers include electromagnetic design, winding and slot fill, magnetic-circuit and cogging-torque control, thermal management, and production consistency. The blended gross margin is approximately 42%.

Market Trends

The market is shifting from heavily customized direct-drive motors toward standardized frame sizes, scalable winding families, and modular integration. Robot joints are

pushing performance gains in compact products through lightweight structures, larger hollow bores, higher overload capability, and lower temperature rise, while semiconductor equipment, precision rotary stages, and machine tools continue to support demand for medium- and large-size motors with smooth low-speed motion. Low-cogging designs, high slot fill, potting-based thermal management, and higher power density are key upgrade directions.

Drivers

Expansion of industrial, collaborative, and humanoid robots is increasing demand for compact high-torque drives, while investment in semiconductor equipment and high-end machine tools supports medium- and large-size direct-drive products. Frameless architectures can be embedded directly into the customer's mechanical structure, reducing couplings, standalone housings, and selected transmission elements while lowering package size and system inertia.

Restraints

Motor performance depends strongly on the customer's bearing arrangement, encoder, assembly tolerances, and thermal structure, creating a relatively high system-design threshold. Volatility in rare-earth magnet costs and the precision required in winding and potting processes also constrain rapid low-cost scaling.

Opportunities

Standardization of robot-joint platforms is expanding the volume market for common frame sizes and low-voltage windings. High-vacuum, cleanroom, medical, and aerospace environments create higher-value opportunities for reliable customized products.

Challenges

Leading customers typically require long life, low torque ripple, batch consistency, and fast customization at the same time. Suppliers must balance electromagnetic design, thermal management, manufacturing automation, and quality validation.

Industry Chain Analysis

Upstream inputs include copper wire, electrical steel, NdFeB magnets, insulation

materials, potting compounds, and temperature sensors. Midstream manufacturing centers on core processing, winding, magnet assembly, potting, balancing, and electrical testing. Downstream robotics, semiconductor equipment, machine tool, medical, and aerospace OEMs integrate bearings, encoders, housings, and the final mechanical structure.

Segment Insights

By continuous torque, products below 20 Nm mainly serve robotics and compact actuators, while products above 20 Nm are more common in machine-tool rotary axes, semiconductor equipment, and large precision rotary platforms. By stator outer diameter, small-diameter products emphasize low weight and overload capability, whereas medium and large sizes emphasize continuous torque, thermal stability, and smooth low-speed motion. Inner-rotor designs have broader general use, while outer-rotor designs are attractive where a longer torque arm and high torque per package volume are priorities.

Downstream Market Opportunities

Robotics remains the most attractive incremental market, particularly humanoid, collaborative, and quadruped robot joints. Semiconductor equipment provides steady precision direct-drive demand in wafer handling, inspection, positioning, and vacuum-motion platforms. High-end machine tools, medical imaging and surgical equipment, optical rotary stages, and aerospace servo systems provide additional differentiated opportunities.

Regional Insights

Asia is the most important production and demand region due to its concentration of robotics, electronics manufacturing, semiconductor equipment, and machine-tool industries, with China's robotics expansion accelerating the development of local frameless-motor supply. Europe has a strong base in machine tools, precision automation, and advanced direct-drive technology, while North American demand is more concentrated in semiconductor equipment, aerospace, defense, medical, and high-end automation.

Competitive Landscape Analysis

Participants include established motion-control vendors, specialist direct-drive motor

companies, and rapidly expanding Chinese suppliers of core robot components. International vendors retain deep engineering experience in high-precision, high-reliability, and medium- to high-power products, while Chinese suppliers are improving quickly in low-voltage compact robot motors, rapid customization, and cost control. Competition is shifting from headline torque alone toward torque density, thermal rise, cogging torque, batch consistency, delivery speed, and collaborative engineering capability.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Frameless Torque Motors 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 Motors portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Frameless Torque Motors market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Frameless Torque Motors 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 Motors.

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

Market Segmentation

Segmentation by Type:

<1 Nm

1–<5 Nm

5–<20 Nm

20–<100 Nm

≥100 Nm

Segmentation by Stator Outer Diameter:

<50 mm

50–<100 mm

100–<200 mm

200–<400 mm

≥400 mm

Segmentation by Rated Voltage:

<48 V

48–<100 V

100–<300 V

≥300 V

Segmentation by Rotor Configuration:

Inner Rotor

Outer Rotor

Segmentation by Application:

Robotics

Semiconductor Equipment

Machine Tools

Medical and Life Science Equipment

Aerospace and Defense

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

Parker Hannifin

Moog

Allient

Aerotech

Lin Engineering

Tecnotion

ETEL

TQ-RoboDrive

Maxon

Magnetic Innovations

Johnson Electric

Kinco Automation

Guangzhou Haozhi Industrial

Zhejiang Hechuan Technology

DINGS

Nanchang Kude Intelligent Technology

Shenzhen Qianghe Motor

Key Questions Addressed in this Report

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

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

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

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

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

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