

Global Hollow Shaft Torque Motor for Humanoid Robot Market Growth 2026-2032

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Abstracts

The global Hollow Shaft Torque Motor for Humanoid Robot market size is predicted to grow from US\$ 44.02 million in 2025 to US\$ 299 million in 2032; it is expected to grow at a CAGR of 26.3% from 2026 to 2032.

Hollow shaft torque motors for humanoid robots are high-torque-density permanent-magnet rotary motors designed for compact integration into humanoid robot joints. The central through-hole enables internal routing of power cables, communication harnesses, sensor wiring and other joint components, while the motor delivers precise, responsive and smooth rotational motion within a limited installation envelope. The principal product forms are frameless stator-and-rotor kits, housed hollow shaft motors and partially integrated motor assemblies incorporating encoders, temperature sensors, bearings or mechanical interfaces. Key specifications include motor outer diameter, hollow-bore diameter, continuous and peak torque, torque density, cogging torque, rotor inertia, rated voltage, operating speed, winding temperature rise and thermal dissipation capability. The market focuses on motors used in lower-limb, upper-limb, torso and waist, and head and neck joints, where lightweight construction, low torque ripple, dynamic response, reliability and efficient heat management directly affect robot payload, mobility, operating time and motion accuracy.

Key Findings

The global average selling price in 2025 was approximately US\$230 per unit.

Frameless stator-and-rotor kits remained the largest product form.

Lower-limb joints represented the largest application segment by revenue contribution.

Upper-limb joints were the fastest-expanding joint application segment.

Asia-Pacific, led by China, maintained the strongest combination of demand growth and manufacturing expansion.

The verified core supplier group comprised 26 manufacturers.

Large-diameter, high-continuous-torque motors for hip and knee joints occupied the premium price band.

Market Trends

Product development is shifting from general-purpose frameless motors toward humanoid-specific platforms with standardized frame sizes, enlarged hollow bores, higher continuous torque density, lower cogging torque and improved thermal performance. Suppliers are expanding from individual stator-and-rotor kits into coordinated motor, encoder, sensor and drive solutions, while preserving a modular interface that allows robot developers to select their own reducer and joint architecture. The increasing use of potting, optimized magnetic circuits, thin-wall structures and integrated temperature monitoring reflects the market's transition from prototype performance optimization to repeatable production and long-duration operation.

Market Dynamics

Demand is being created by two parallel development paths. Established robot developers are redesigning joints to reduce weight, improve range of motion and extend battery operating time, while newer entrants increasingly purchase standardized frameless motor platforms to shorten development cycles. At the same time, vertically integrated robot manufacturers continue to develop selected motors internally, limiting the addressable merchant market. The competitive balance therefore depends not only on robot shipments, but also on the proportion of joint motors outsourced to independent suppliers.

Drivers

The principal growth drivers are the expansion of humanoid robot pilot deployments, increasing joint counts, higher payload requirements and the transition from demonstration units to repeatable industrial production. Government programs

supporting humanoid robot innovation, core component availability and manufacturing ecosystems are accelerating supplier investment in electromagnetic design, winding automation, testing and production capacity. Greater availability of standardized motor sizes also reduces the engineering burden for robot developers and supports faster joint-platform iteration.

Restraints

The market remains constrained by the absence of unified joint and motor interface standards, long customer validation cycles and substantial differences between prototype specifications and mass-production requirements. High-performance motors require close coordination among electromagnetic design, reducer selection, encoder accuracy, drive algorithms and heat dissipation. A motor that performs well in laboratory testing may require redesign when exposed to repeated impact loads, extended duty cycles or compact sealed-joint conditions. Internal motor development by major robot manufacturers also reduces the volume available to independent suppliers.

Opportunities

The strongest opportunities lie in modular frameless motor kits, large-hollow-bore designs and product families covering multiple joint sizes through a common electromagnetic and manufacturing platform. Suppliers capable of supporting shoulder, elbow, waist, hip, knee and ankle joints with coordinated frame sizes can gain a larger share of each robot platform. Additional opportunities exist in partially integrated motor assemblies, regionalized supply chains, automated winding and testing, and customized high-voltage or high-thermal-capacity products for industrial humanoids. Policy support for core components and supply-chain security further favors manufacturers with local production and engineering support.

Challenges

The central engineering challenge is balancing torque density, hollow-bore size, motor weight, temperature rise, efficiency, cogging torque and cost within a highly restricted joint envelope. Enlarging the hollow bore can reduce available electromagnetic volume, while increasing continuous torque raises winding and magnet temperature. Suppliers must also control lamination consistency, winding fill factor, magnet positioning, rotor balance, insulation reliability and potting quality across production batches. Demand uncertainty remains another risk because robot capacity announcements, customer orders and actual deliveries may occur on different timelines.

Industry Chain Analysis

The upstream industry includes permanent magnets, electrical steel laminations, copper wire, insulation materials, adhesives, thermal materials, shafts, sleeves, bearings, encoders and temperature sensors. Midstream manufacturers undertake electromagnetic and thermal design, lamination processing, winding, stator potting, magnet assembly, rotor balancing, inspection and performance testing. Downstream customers include joint-module producers and humanoid robot manufacturers, which integrate the motor with reducers, encoders, torque sensors, brakes, drives and structural components. Manufacturing consistency and joint-level engineering support are critical links between motor production and robot commercialization.

Value Chain Analysis

Value creation is concentrated in electromagnetic topology, thermal design, material selection, precision winding, low-cogging manufacturing and application-specific customization rather than in raw material conversion alone. Frameless kits provide customers with greater mechanical design freedom, while partially integrated assemblies allow motor suppliers to capture additional value through sensing, bearings and interface engineering. As volumes rise, automation and standardized platforms will reduce unit prices, but suppliers with verified reliability, rapid customization and joint-system engineering capability should retain stronger pricing power than commodity motor producers.

Segment Insights

By product form, frameless stator-and-rotor kits account for the largest share because they allow the reducer, housing, bearings and sensing components to be integrated directly into the robot joint. Housed hollow shaft motors serve applications requiring easier assembly and replacement, while partially integrated motor assemblies are gaining attention among customers seeking shorter development cycles. By motor size, products with outer diameters of approximately 50–120 mm form the mainstream demand range. By application, lower-limb joints generate the largest revenue contribution because hip, knee and ankle motors require higher torque and thermal capacity, whereas upper-limb joints are expanding faster as manipulation-oriented robots add more capable shoulder, elbow and wrist systems.

Downstream Market Opportunities

Near-term commercial opportunities are concentrated in manufacturing, warehouse handling, material transfer, inspection and other structured environments where repetitive tasks and measurable productivity can support robot investment. These applications require durable hip and knee drive systems as well as increasingly capable upper-body joints for lifting, positioning and tool interaction. Research, education and service robots remain important for product validation and low-volume sales, while broader consumer and public-service adoption will depend on improvements in system safety, battery life, reliability and total ownership cost.

Regional Insights

Asia-Pacific has the strongest current demand and supply-chain expansion, with China combining a dense humanoid robot development ecosystem, a broad motor and automation manufacturing base, and policy support for core component localization. North America remains influential in high-performance motor design, robot prototypes and advanced joint-system engineering. Europe retains strengths in high-torque-density frameless motors, precision manufacturing and premium customized products. Japan and South Korea possess established motor technology and manufacturing capabilities, although the number of suppliers publicly positioning dedicated products for humanoid robot joints remains comparatively limited.

Competitive Landscape Analysis

The competitive landscape is divided into three regional groups. North American and European suppliers are strongest in high-performance electromagnetic design, low-cogging control, thermal reliability and engineering support for demanding robot platforms. Chinese suppliers are expanding rapidly through broad frame-size portfolios, faster customization, integrated motion-control capabilities and competitive production costs. Japanese and South Korean suppliers benefit from established motor manufacturing and quality-control expertise but currently show a narrower publicly disclosed humanoid-specific product portfolio. Competition is moving from individual motor specifications toward platform coverage, production consistency, customer validation speed and the ability to support multiple joints within a single robot architecture.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Hollow Shaft Torque Motor for

Humanoid Robot Industry Forecast” looks at past sales and reviews total world Hollow Shaft Torque Motor for Humanoid Robot sales in 2025, providing a comprehensive analysis by region and market sector of projected Hollow Shaft Torque Motor for Humanoid Robot sales for 2026 through 2032. With Hollow Shaft Torque Motor for Humanoid Robot sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Hollow Shaft Torque Motor for Humanoid Robot industry.

This Insight Report provides a comprehensive analysis of the global Hollow Shaft Torque Motor for Humanoid Robot 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 Hollow Shaft Torque Motor for Humanoid Robot portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Hollow Shaft Torque Motor for Humanoid Robot market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Hollow Shaft Torque Motor for Humanoid Robot and breaks down the forecast by Motor Drive Technology, 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 Hollow Shaft Torque Motor for Humanoid Robot.

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

Market Segmentation

Segmentation by Motor Drive Technology:

Direct Drive Torque Motor

Brushless DC Torque Motor

Permanent Magnet Synchronous Torque Motor

Others

Segmentation by Motor Outer Diameter:

Up to 50 mm

Above 50 mm to 80 mm

Above 80 mm to 120 mm

Above 120 mm

Segmentation by Continuous Torque:

Up to 1 N·m

Above 1 N·m to 5 N·m

Above 5 N·m to 15 N·m

Above 15 N·m

Segmentation by Application:

Lower Limb Joints

Upper Limb Joints

Torso and Waist Joints

Head and Neck Joints

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.

Regal Rexnord Corporation

TQ Systems GmbH

Allient Inc.

Johnson Electric Holdings Limited

Shanghai Kinco Automation Co., Ltd.

Shenzhen Leadshine Technology Co., Ltd.

Nidec Corporation

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Shenzhen Inovance Technology Co., Ltd.

Jiangsu DINGS' Intelligent Control Technology Co., Ltd.

Zhejiang Hechuan Technology Co., Ltd.

Shanghai MOONS' Electric Co., Ltd.

Guangzhou Haozhi Industrial Co., Ltd.

Suzhou VEICHI Electric Co., Ltd.

Han's Laser Technology Industry Group Co., Ltd.

HIGEN RNM Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Hollow Shaft Torque Motor for Humanoid Robot market?

What factors are driving Hollow Shaft Torque Motor for Humanoid Robot market growth, globally and by region?

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

How do Hollow Shaft Torque Motor for Humanoid Robot market opportunities vary by end market size?

How does Hollow Shaft Torque Motor for Humanoid Robot break out by Motor Drive Technology, by Application?

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