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Global Robot Joint Electromagnetic Brakes Market Growth 2026-2032

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Abstracts

The global Robot Joint Electromagnetic Brakes market size is predicted to grow from US$ 207 million in 2025 to US$ 436 million in 2032; it is expected to grow at a CAGR of 11.2% from 2026 to 2032.

Robot Joint Electromagnetic Brakes are compact electromechanical safety components integrated into robot joints, joint motors or actuator transmission chains to hold an axis in position and prevent unintended motion during power loss, emergency stops or controlled shutdowns. The market primarily covers spring-applied electromagnetic brakes and permanent magnet brakes designed for articulated robots, collaborative robots, humanoid robots, surgical robots and SCARA systems. Key technical attributes include rated holding torque, response time, brake thickness, outer diameter, hollow-shaft capability, backlash, thermal performance and power consumption. Products range from sub-Nm miniature brakes for lightweight and precision joints to brake systems exceeding 100 Nm for higher-load articulated axes. Robot Joint Electromagnetic Brakes are increasingly optimized for compact joint packaging, low inertia, large through-bores for cable routing, low energy consumption and reliable fail-safe operation, making them an important functional component within integrated robot joint modules.

Key Findings

Global Robot Joint Electromagnetic Brake shipments are estimated at approximately 1.07 million units in 2025 and 1.18 million units in 2026

The global weighted average selling price is approximately US$198 per unit in 2025 and US$200 per unit in 2026

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Conventional industrial articulated robot joints remain the largest application and represent roughly four-fifths of current demand

Asia is the largest demand region, supported by the world's highest concentration of new industrial robot installations

Spring-applied electromagnetic brakes remain the mainstream product type while permanent magnet brakes gain importance in compact high-density joints

Market Trends

Robot Joint Electromagnetic Brakes are moving toward thinner profiles, larger hollow shafts, lower inertia, lower power consumption and higher torque density as robot joints become increasingly integrated. Current product development is particularly focused on hollow-axis architectures that allow power, signal and pneumatic lines to pass through the joint without increasing the overall envelope. mayr's ROBA servostop Cobot, for example, is specifically designed as a hollow-shaft safety brake for lightweight robot and cobot joints, while REACH has introduced an ultra-thin spring brake with a thickness as low as 8 mm for robot joint modules. The next stage of development is increasingly linked to humanoid robotics, where joint brakes must combine compactness, low weight, high cycling reliability and fail-safe holding across multiple upper- and lower-limb axes. The International Federation of Robotics identified humanoid robots entering real-world testing environments and increased emphasis on robot safety as two of the major global robotics trends for 2026, reinforcing demand for higher-performance joint safety components.

Market Dynamics

Drivers

Growth in Robot Joint Electromagnetic Brakes is primarily driven by sustained expansion of industrial automation, increasing robot axis density and the broader adoption of collaborative and intelligent robots. IFR recorded 542,000 new industrial robot installations in 2024, with annual installations remaining above 500,000 units for four consecutive years and approximately 4.66 million industrial robots operating globally. IFR also projected installations to rise to around 575,000 units in 2025. As robots move from fenced industrial cells into shared workspaces, medical environments and human-centered production settings, fail-safe axis holding becomes increasingly

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important. Higher joint integration also raises the value of compact, low-backlash brakes that can be installed directly inside motors or joint actuators.

Restraints

The principal restraints are technical qualification requirements, cost pressure and the limited installation space available inside modern robot joints. High-performance brakes must deliver repeatable holding torque under changing temperature, voltage and duty-cycle conditions while maintaining low inertia, low acoustic noise and stable release characteristics. Hollow-shaft and ultra-thin designs increase manufacturing complexity and tighten requirements for magnetic circuits, friction materials, dimensional tolerances and assembly consistency. At the same time, robot OEMs and joint-module suppliers continuously pursue cost reduction, particularly in high-volume Asian markets, creating pricing pressure on specialist brake manufacturers. In some robot platforms, brakes are also supplied as part of integrated servo motors or internally developed actuator modules, reducing the addressable volume available to independent brake suppliers.

Opportunities

The strongest incremental opportunities are concentrated in collaborative robots, humanoid robots, compact articulated robots and surgical robot manipulators. Humanoid robots are particularly attractive because a single platform may contain multiple gravity-loaded or safety-critical joints across the shoulders, elbows, wrists, hips and knees, increasing potential brake content per robot. IFR notes that humanoid robots are moving beyond prototypes into real-world testing in automotive manufacturing, warehousing and other human-oriented environments. Surgical robotics also provides a premium opportunity because precise joint locking, low backlash, low noise and reliable fail-safe performance are critical to manipulator positioning. In parallel, localization of robot supply chains in China is opening opportunities for domestic brake manufacturers capable of combining competitive costs with customized hollow-shaft, ultra-thin and permanent-magnet designs.

Challenges

Long-term challenges center on reliability validation, product standardization and the uncertain commercialization pace of emerging robot platforms. Robot joint brakes are safety-related components, so failure modes involving incomplete release, torque degradation, thermal drift or excessive wear can directly affect robot uptime and safety performance. The wide variation in motor diameter, joint architecture, rated torque, supply voltage and internal cable routing means that many products remain highly

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customized, limiting economies of scale. Humanoid robotics creates substantial potential but also introduces uncertainty because platform architectures and component specifications have not yet converged. Suppliers therefore face simultaneous pressure to invest in customized engineering, automated production and validation capabilities while maintaining pricing flexibility as downstream robot architectures continue to evolve.

Industry Chain Analysis

The upstream industry chain for Robot Joint Electromagnetic Brakes consists primarily of electromagnetic materials, permanent magnets, copper wire, electrical steel, springs, friction materials, bearings, precision-machined housings and hubs, insulation materials and electronic rectification or monitoring components. Cost and performance are strongly influenced by magnetic material quality, precision machining, friction-pair consistency and automated assembly capability. Midstream manufacturers undertake magnetic circuit design, mechanical structure engineering, coil production, precision machining, assembly, air-gap adjustment, torque calibration, endurance testing and customized integration. The largest value contribution is generally created through compact structural design, repeatable torque performance, fail-safe reliability, low-backlash engineering and application-specific customization rather than through raw-material content alone.

Downstream customers include robot OEMs, servo motor manufacturers, joint-module suppliers and specialized medical or automation equipment manufacturers. In conventional industrial robots, brakes are commonly integrated into gravity-loaded axes and servo motor assemblies; in collaborative and humanoid systems, greater joint compactness favors direct integration into hollow-shaft actuators and frameless motor modules. This structure creates two parallel supply models: standardized high-volume brake platforms for mainstream servo and robot applications, and customized brakes developed jointly with robot or actuator manufacturers for specific joint geometries. The latter generally carries higher engineering content and stronger customer qualification requirements.

Segment Insights

By product type, spring-applied electromagnetic brakes remain the dominant architecture because the normally engaged, power-off operating principle provides an intuitive fail-safe solution for gravity-loaded robot axes and is widely adopted across industrial robots and cobots. The segment benefits from mature manufacturing

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processes, broad torque coverage and established integration with servo motors. Permanent magnet brakes represent the key higher-performance alternative, particularly where low backlash, high torque density, compact axial dimensions and reduced power consumption are critical. Their opportunity is strongest in compact collaborative robots, medical robots and emerging humanoid joint modules.

By technical configuration, hollow-shaft and ultra-thin products are becoming increasingly important because joint-module designers need to route power, communication and sensing cables through the center of the actuator while minimizing axial length. Rated holding torque spans from sub-Nm miniature products to more than 100 Nm for heavy articulated axes, but the highest-volume opportunity remains concentrated in the low- to medium-torque range used by collaborative robots, compact industrial arms and distributed humanoid joints. Tooth-locking brakes remain a specialized niche for applications requiring high static holding torque and positive mechanical engagement and are therefore smaller than conventional friction-based solutions.

Downstream Market Opportunities

Industrial articulated robots remain the largest downstream application, supported by extensive use of holding brakes on vertical and gravity-loaded axes in welding, material handling, machine tending and palletizing systems. Collaborative robots provide a faster-growing opportunity because compact six-axis architectures require thinner, lighter and often hollow-shaft braking solutions. Humanoid robots could materially increase brake content per platform as multiple shoulder, arm and leg joints require safe holding under power-loss conditions, while surgical robot manipulators create a smaller but higher-value segment characterized by stringent requirements for precision, low backlash and stable positioning. SCARA robots and other compact automation platforms provide additional demand where vertical-axis holding and rapid cycle operation require small, responsive brakes.

Regional Insights

Asia represents the largest demand base for Robot Joint Electromagnetic Brakes because it combines the world's largest industrial robot installation base with strong production clusters for robots, servo motors and precision joint components. IFR reported that Asia accounted for 74% of global industrial robot installations in 2024, while China alone represented 54% with approximately 295,000 installations. Japan installed about 44,500 units and Korea about 30,600 units during the same period.

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China's approximately two million-unit operational robot stock and increasing localization of robot suppliers support both demand growth and local brake manufacturing capability.

Europe remains strategically important because Germany, Italy, Switzerland and the United Kingdom host established specialist brake manufacturers with strong positions in safety braking, servo technology and high-precision motion control. The Americas represent a smaller installation base but remain important for industrial automation, medical robotics and specialized high-value brake designs. Regional competition therefore differs materially: Asia emphasizes volume, localization and joint-module integration, while European and North American suppliers generally retain stronger positions in premium safety braking, customized engineering and demanding specialty applications.

Competitive Landscape Analysis

The Robot Joint Electromagnetic Brakes market combines a concentrated group of established global brake specialists with a broader set of regional and application-focused manufacturers. The confirmed core supplier pool comprises 26 competitive manufacturing entities after parent-company, subsidiary and brand duplication is removed. The leading global group includes OGURA CLUTCH, Kendrion, Chr. Mayr, Regal Rexnord through its Warner Electric brake business, KEB Automation, Miki Pulley and REACH Machinery. Competition increasingly centers on torque density, axial thickness, hollow-shaft diameter, backlash control, fail-safe reliability, thermal stability, energy consumption and the ability to customize products around specific motor and joint geometries. European and Japanese suppliers retain strengths in mature safety-brake technology, application engineering and global customer qualification, while Chinese manufacturers are strengthening their position through localized manufacturing, shorter development cycles and increasingly specialized products for collaborative and humanoid robot joints. The market also contains technically focused specialists serving surgical robotics, compact actuators and positive-locking applications, resulting in a competitive structure characterized by a strong global head and a technically differentiated specialist tail.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Robot Joint Electromagnetic Brakes Industry Forecast” looks at past sales and reviews total world Robot Joint Electromagnetic Brakes sales in 2025, providing a comprehensive analysis by region

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and market sector of projected Robot Joint Electromagnetic Brakes sales for 2026 through 2032. With Robot Joint Electromagnetic Brakes sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Robot Joint Electromagnetic Brakes industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Robot Joint Electromagnetic Brakes 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 Robot Joint Electromagnetic Brakes.

This report presents a comprehensive overview, market shares, and growth opportunities of Robot Joint Electromagnetic Brakes market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Spring-Applied Electromagnetic Brake

Permanent Magnet Brake

Other

Segmentation by Rated Holding Torque:

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?1 Nm

>1–10 Nm

>10–100 Nm

>100 Nm

Segmentation by Application:

Conventional Industrial Articulated Robot Joints

Collaborative Robot Joints

Humanoid Robot Joints

Surgical Robot Manipulator Joints

SCARA Robot Axes

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

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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

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market penetration.

OGURA CLUTCH CO.,LTD.

Kendrion N.V.

Chr. Mayr GmbH + Co. KG

Regal Rexnord Corporation

KEB Automation KG

Miki Pulley Co., Ltd.

REACH Machinery Co., Ltd.

PRECIMA Magnettechnik GmbH

SINFONIA TECHNOLOGY CO., LTD.

Chengdu CDC Technology Co., Ltd.

Nexen Group, Inc.

Suzhou Caiyi Power Technology Co., Ltd.

Stephenson Gobin Limited

CHAIN TAIL CO., LTD.

Maschinenfabrik M?nninghoff GmbH & Co. KG

Temporiti S.r.l.

????????

Kunshan Ankoncn Development Equipment Co.,Ltd.

Zhuji Shi Xiaomu Keji Youxian Gongsi

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Emco Dynatorq Pvt. Ltd.

Shanghai Qichuang Electronic Technology Co., Ltd.

St?we Switzerland AG

SEPAC Inc.

CARLYLE JOHNSON MACHINE COMPANY, LLC.

Electroid Company

KNOTT VORTEX PRIVATE LIMITED

Key Questions Addressed in this Report

What is the 10-year outlook for the global Robot Joint Electromagnetic Brakes market?

What factors are driving Robot Joint Electromagnetic Brakes market growth, globally and by region?

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

How do Robot Joint Electromagnetic Brakes market opportunities vary by end market size?

How does Robot Joint Electromagnetic Brakes break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Robot Joint Electromagnetic Brakes Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Robot Joint Electromagnetic Brakes by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Robot Joint Electromagnetic Brakes by Country/Region, 2021, 2025 & 2032
2.2 Robot Joint Electromagnetic Brakes Segment by Type
  2.2.1 Spring-Applied Electromagnetic Brake
  2.2.2 Permanent Magnet Brake
  2.2.3 Other
  2.2.4 Robot Joint Electromagnetic Brakes Sales by Type
    2.2.4.1 Global Robot Joint Electromagnetic Brakes Sales Market Share by Type (2021-2026)
    2.2.4.2 Global Robot Joint Electromagnetic Brakes Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global Robot Joint Electromagnetic Brakes Sale Price by Type (2021-2026)
2.3 Robot Joint Electromagnetic Brakes Segment by Rated Holding Torque
  2.3.1 ?1 Nm
  2.3.2 >1–10 Nm
  2.3.3 >10–100 Nm
  2.3.4 >100 Nm
  2.3.5 Robot Joint Electromagnetic Brakes Sales by Rated Holding Torque
    2.3.5.1 Global Robot Joint Electromagnetic Brakes Sales Market Share by Rated Holding Torque (2021-2026)

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2.3.5.2 Global Robot Joint Electromagnetic Brakes Revenue and Market Share by Rated Holding Torque (2021-2026)
2.3.5.3 Global Robot Joint Electromagnetic Brakes Sale Price by Rated Holding Torque (2021-2026)
2.4 Robot Joint Electromagnetic Brakes Segment by Application
2.4.1 Conventional Industrial Articulated Robot Joints
2.4.2 Collaborative Robot Joints
2.4.3 Humanoid Robot Joints
2.4.4 Surgical Robot Manipulator Joints
2.4.5 SCARA Robot Axes
2.4.6 Other
2.4.7 Robot Joint Electromagnetic Brakes Sales by Application
2.4.7.1 Global Robot Joint Electromagnetic Brakes Sale Market Share by Application (2021-2026)
2.4.7.2 Global Robot Joint Electromagnetic Brakes Revenue and Market Share by Application (2021-2026)
2.4.7.3 Global Robot Joint Electromagnetic Brakes Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Robot Joint Electromagnetic Brakes Breakdown Data by Company
3.1.1 Global Robot Joint Electromagnetic Brakes Annual Sales by Company (2021-2026)
3.1.2 Global Robot Joint Electromagnetic Brakes Sales Market Share by Company (2021-2026)
3.2 Global Robot Joint Electromagnetic Brakes Annual Revenue by Company (2021-2026)
3.2.1 Global Robot Joint Electromagnetic Brakes Revenue by Company (2021-2026)
3.2.2 Global Robot Joint Electromagnetic Brakes Revenue Market Share by Company (2021-2026)
3.3 Global Robot Joint Electromagnetic Brakes Sale Price by Company
3.4 Key Manufacturers Robot Joint Electromagnetic Brakes Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Robot Joint Electromagnetic Brakes Product Location Distribution
3.4.2 Players Robot Joint Electromagnetic Brakes Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis

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info@marketpublishers.com

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ROBOT JOINT ELECTROMAGNETIC BRAKES BY GEOGRAPHIC REGION

4.1 World Historic Robot Joint Electromagnetic Brakes Market Size by Geographic Region (2021-2026)
4.1.1 Global Robot Joint Electromagnetic Brakes Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Robot Joint Electromagnetic Brakes Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Robot Joint Electromagnetic Brakes Market Size by Country/Region (2021-2026)
4.2.1 Global Robot Joint Electromagnetic Brakes Annual Sales by Country/Region (2021-2026)
4.2.2 Global Robot Joint Electromagnetic Brakes Annual Revenue by Country/Region (2021-2026)
4.3 Americas Robot Joint Electromagnetic Brakes Sales Growth
4.4 APAC Robot Joint Electromagnetic Brakes Sales Growth
4.5 Europe Robot Joint Electromagnetic Brakes Sales Growth
4.6 Middle East & Africa Robot Joint Electromagnetic Brakes Sales Growth

5 AMERICAS

5.1 Americas Robot Joint Electromagnetic Brakes Sales by Country
5.1.1 Americas Robot Joint Electromagnetic Brakes Sales by Country (2021-2026)
5.1.2 Americas Robot Joint Electromagnetic Brakes Revenue by Country (2021-2026)
5.2 Americas Robot Joint Electromagnetic Brakes Sales by Type (2021-2026)
5.3 Americas Robot Joint Electromagnetic Brakes Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Robot Joint Electromagnetic Brakes Sales by Region

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6.1.1 APAC Robot Joint Electromagnetic Brakes Sales by Region (2021-2026)
6.1.2 APAC Robot Joint Electromagnetic Brakes Revenue by Region (2021-2026)
6.2 APAC Robot Joint Electromagnetic Brakes Sales by Type (2021-2026)
6.3 APAC Robot Joint Electromagnetic Brakes Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Robot Joint Electromagnetic Brakes by Country
7.1.1 Europe Robot Joint Electromagnetic Brakes Sales by Country (2021-2026)
7.1.2 Europe Robot Joint Electromagnetic Brakes Revenue by Country (2021-2026)
7.2 Europe Robot Joint Electromagnetic Brakes Sales by Type (2021-2026)
7.3 Europe Robot Joint Electromagnetic Brakes Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Robot Joint Electromagnetic Brakes by Country
8.1.1 Middle East & Africa Robot Joint Electromagnetic Brakes Sales by Country (2021-2026)
8.1.2 Middle East & Africa Robot Joint Electromagnetic Brakes Revenue by Country (2021-2026)
8.2 Middle East & Africa Robot Joint Electromagnetic Brakes Sales by Type (2021-2026)
8.3 Middle East & Africa Robot Joint Electromagnetic Brakes Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel

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8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Robot Joint Electromagnetic Brakes
10.3 Manufacturing Process Analysis of Robot Joint Electromagnetic Brakes
10.4 Industry Chain Structure of Robot Joint Electromagnetic Brakes

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Robot Joint Electromagnetic Brakes Distributors
11.3 Robot Joint Electromagnetic Brakes Customer

12 WORLD FORECAST REVIEW FOR ROBOT JOINT ELECTROMAGNETIC BRAKES BY GEOGRAPHIC REGION

12.1 Global Robot Joint Electromagnetic Brakes Market Size Forecast by Region
  12.1.1 Global Robot Joint Electromagnetic Brakes Forecast by Region (2027-2032)
  12.1.2 Global Robot Joint Electromagnetic Brakes Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Robot Joint Electromagnetic Brakes Forecast by Type (2027-2032)
12.7 Global Robot Joint Electromagnetic Brakes Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

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13.1 OGURA CLUTCH CO.,LTD.
13.1.1 OGURA CLUTCH CO.,LTD. Company Information
13.1.2 OGURA CLUTCH CO.,LTD. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.1.3 OGURA CLUTCH CO.,LTD. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 OGURA CLUTCH CO.,LTD. Main Business Overview
13.1.5 OGURA CLUTCH CO.,LTD. Latest Developments
13.2 Kendrion N.V.
13.2.1 Kendrion N.V. Company Information
13.2.2 Kendrion N.V. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.2.3 Kendrion N.V. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Kendrion N.V. Main Business Overview
13.2.5 Kendrion N.V. Latest Developments
13.3 Chr. Mayr GmbH + Co. KG
13.3.1 Chr. Mayr GmbH + Co. KG Company Information
13.3.2 Chr. Mayr GmbH + Co. KG Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.3.3 Chr. Mayr GmbH + Co. KG Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Chr. Mayr GmbH + Co. KG Main Business Overview
13.3.5 Chr. Mayr GmbH + Co. KG Latest Developments
13.4 Regal Rexnord Corporation
13.4.1 Regal Rexnord Corporation Company Information
13.4.2 Regal Rexnord Corporation Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.4.3 Regal Rexnord Corporation Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Regal Rexnord Corporation Main Business Overview
13.4.5 Regal Rexnord Corporation Latest Developments
13.5 KEB Automation KG
13.5.1 KEB Automation KG Company Information
13.5.2 KEB Automation KG Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.5.3 KEB Automation KG Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)

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13.5.4 KEB Automation KG Main Business Overview
13.5.5 KEB Automation KG Latest Developments
13.6 Miki Pulley Co., Ltd.
13.6.1 Miki Pulley Co., Ltd. Company Information
13.6.2 Miki Pulley Co., Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.6.3 Miki Pulley Co., Ltd. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Miki Pulley Co., Ltd. Main Business Overview
13.6.5 Miki Pulley Co., Ltd. Latest Developments
13.7 REACH Machinery Co., Ltd.
13.7.1 REACH Machinery Co., Ltd. Company Information
13.7.2 REACH Machinery Co., Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.7.3 REACH Machinery Co., Ltd. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 REACH Machinery Co., Ltd. Main Business Overview
13.7.5 REACH Machinery Co., Ltd. Latest Developments
13.8 PRECIMA Magnettechnik GmbH
13.8.1 PRECIMA Magnettechnik GmbH Company Information
13.8.2 PRECIMA Magnettechnik GmbH Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.8.3 PRECIMA Magnettechnik GmbH Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 PRECIMA Magnettechnik GmbH Main Business Overview
13.8.5 PRECIMA Magnettechnik GmbH Latest Developments
13.9 SINFONIA TECHNOLOGY CO., LTD.
13.9.1 SINFONIA TECHNOLOGY CO., LTD. Company Information
13.9.2 SINFONIA TECHNOLOGY CO., LTD. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.9.3 SINFONIA TECHNOLOGY CO., LTD. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 SINFONIA TECHNOLOGY CO., LTD. Main Business Overview
13.9.5 SINFONIA TECHNOLOGY CO., LTD. Latest Developments
13.10 Chengdu CDC Technology Co., Ltd.
13.10.1 Chengdu CDC Technology Co., Ltd. Company Information
13.10.2 Chengdu CDC Technology Co., Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.10.3 Chengdu CDC Technology Co., Ltd. Robot Joint Electromagnetic Brakes

+357 96 030922
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Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Chengdu CDC Technology Co., Ltd. Main Business Overview
13.10.5 Chengdu CDC Technology Co., Ltd. Latest Developments
13.11 Nexen Group, Inc.
13.11.1 Nexen Group, Inc. Company Information
13.11.2 Nexen Group, Inc. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.11.3 Nexen Group, Inc. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Nexen Group, Inc. Main Business Overview
13.11.5 Nexen Group, Inc. Latest Developments
13.12 Suzhou Caiyi Power Technology Co., Ltd.
13.12.1 Suzhou Caiyi Power Technology Co., Ltd. Company Information
13.12.2 Suzhou Caiyi Power Technology Co., Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.12.3 Suzhou Caiyi Power Technology Co., Ltd. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Suzhou Caiyi Power Technology Co., Ltd. Main Business Overview
13.12.5 Suzhou Caiyi Power Technology Co., Ltd. Latest Developments
13.13 Stephenson Gobin Limited
13.13.1 Stephenson Gobin Limited Company Information
13.13.2 Stephenson Gobin Limited Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.13.3 Stephenson Gobin Limited Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Stephenson Gobin Limited Main Business Overview
13.13.5 Stephenson Gobin Limited Latest Developments
13.14 CHAIN TAIL CO., LTD.
13.14.1 CHAIN TAIL CO., LTD. Company Information
13.14.2 CHAIN TAIL CO., LTD. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.14.3 CHAIN TAIL CO., LTD. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 CHAIN TAIL CO., LTD. Main Business Overview
13.14.5 CHAIN TAIL CO., LTD. Latest Developments
13.15 Maschinenfabrik M?nninghoff GmbH & Co. KG
13.15.1 Maschinenfabrik M?nninghoff GmbH & Co. KG Company Information
13.15.2 Maschinenfabrik M?nninghoff GmbH & Co. KG Robot Joint Electromagnetic Brakes Product Portfolios and Specifications

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13.15.3 Maschinenfabrik M?nninghoff GmbH & Co. KG Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Maschinenfabrik M?nninghoff GmbH & Co. KG Main Business Overview
13.15.5 Maschinenfabrik M?nninghoff GmbH & Co. KG Latest Developments
13.16 Temporiti S.r.l.
13.16.1 Temporiti S.r.l. Company Information
13.16.2 Temporiti S.r.l. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.16.3 Temporiti S.r.l. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Temporiti S.r.l. Main Business Overview
13.16.5 Temporiti S.r.l. Latest Developments
13.17 ????????
13.17.1 ???????? Company Information
13.17.2 ???????? Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.17.3 ???????? Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 ???????? Main Business Overview
13.17.5 ???????? Latest Developments
13.18 Kunshan Ankoncn Development Equipment Co.,Ltd.
13.18.1 Kunshan Ankoncn Development Equipment Co.,Ltd. Company Information
13.18.2 Kunshan Ankoncn Development Equipment Co.,Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.18.3 Kunshan Ankoncn Development Equipment Co.,Ltd. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Kunshan Ankoncn Development Equipment Co.,Ltd. Main Business Overview
13.18.5 Kunshan Ankoncn Development Equipment Co.,Ltd. Latest Developments
13.19 Zhuji Shi Xiaomu Keji Youxian Gongsi
13.19.1 Zhuji Shi Xiaomu Keji Youxian Gongsi Company Information
13.19.2 Zhuji Shi Xiaomu Keji Youxian Gongsi Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.19.3 Zhuji Shi Xiaomu Keji Youxian Gongsi Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Zhuji Shi Xiaomu Keji Youxian Gongsi Main Business Overview
13.19.5 Zhuji Shi Xiaomu Keji Youxian Gongsi Latest Developments
13.20 Emco Dynatorq Pvt. Ltd.
13.20.1 Emco Dynatorq Pvt. Ltd. Company Information
13.20.2 Emco Dynatorq Pvt. Ltd. Robot Joint Electromagnetic Brakes Product

+357 96 030922
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Portfolios and Specifications
13.20.3 Emco Dynatorq Pvt. Ltd. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Emco Dynatorq Pvt. Ltd. Main Business Overview
13.20.5 Emco Dynatorq Pvt. Ltd. Latest Developments
13.21 Shanghai Qichuang Electronic Technology Co., Ltd.
13.21.1 Shanghai Qichuang Electronic Technology Co., Ltd. Company Information
13.21.2 Shanghai Qichuang Electronic Technology Co., Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.21.3 Shanghai Qichuang Electronic Technology Co., Ltd. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 Shanghai Qichuang Electronic Technology Co., Ltd. Main Business Overview
13.21.5 Shanghai Qichuang Electronic Technology Co., Ltd. Latest Developments
13.22 St?we Switzerland AG
13.22.1 St?we Switzerland AG Company Information
13.22.2 St?we Switzerland AG Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.22.3 St?we Switzerland AG Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 St?we Switzerland AG Main Business Overview
13.22.5 St?we Switzerland AG Latest Developments
13.23 SEPAC Inc.
13.23.1 SEPAC Inc. Company Information
13.23.2 SEPAC Inc. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.23.3 SEPAC Inc. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.23.4 SEPAC Inc. Main Business Overview
13.23.5 SEPAC Inc. Latest Developments
13.24 CARLYLE JOHNSON MACHINE COMPANY, LLC.
13.24.1 CARLYLE JOHNSON MACHINE COMPANY, LLC. Company Information
13.24.2 CARLYLE JOHNSON MACHINE COMPANY, LLC. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.24.3 CARLYLE JOHNSON MACHINE COMPANY, LLC. Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.24.4 CARLYLE JOHNSON MACHINE COMPANY, LLC. Main Business Overview
13.24.5 CARLYLE JOHNSON MACHINE COMPANY, LLC. Latest Developments
13.25 Electroid Company
13.25.1 Electroid Company Company Information

+357 96 030922
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13.25.2 Electroid Company Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.25.3 Electroid Company Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.25.4 Electroid Company Main Business Overview
13.25.5 Electroid Company Latest Developments
13.26 KNOTT VORTEX PRIVATE LIMITED
13.26.1 KNOTT VORTEX PRIVATE LIMITED Company Information
13.26.2 KNOTT VORTEX PRIVATE LIMITED Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
13.26.3 KNOTT VORTEX PRIVATE LIMITED Robot Joint Electromagnetic Brakes Sales, Revenue, Price and Gross Margin (2021-2026)
13.26.4 KNOTT VORTEX PRIVATE LIMITED Main Business Overview
13.26.5 KNOTT VORTEX PRIVATE LIMITED Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. Robot Joint Electromagnetic Brakes Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Robot Joint Electromagnetic Brakes Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Spring-Applied Electromagnetic Brake
Table 4. Major Players of Permanent Magnet Brake
Table 5. Major Players of Other
Table 6. Global Robot Joint Electromagnetic Brakes Sales by Type (2021-2026) & (K Units)
Table 7. Global Robot Joint Electromagnetic Brakes Sales Market Share by Type (2021-2026)
Table 8. Global Robot Joint Electromagnetic Brakes Revenue by Type (2021-2026) & ($ million)
Table 9. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Type (2021-2026)
Table 10. Global Robot Joint Electromagnetic Brakes Sale Price by Type (2021-2026) & (US$/Unit)
Table 11. Major Players of ?1 Nm
Table 12. Major Players of >1–10 Nm
Table 13. Major Players of >10–100 Nm
Table 14. Major Players of >100 Nm
Table 15. Global Robot Joint Electromagnetic Brakes Sales by Rated Holding Torque (2021-2026) & (K Units)
Table 16. Global Robot Joint Electromagnetic Brakes Sales Market Share by Rated Holding Torque (2021-2026)
Table 17. Global Robot Joint Electromagnetic Brakes Revenue by Rated Holding Torque (2021-2026) & ($ million)
Table 18. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Rated Holding Torque (2021-2026)
Table 19. Global Robot Joint Electromagnetic Brakes Sale Price by Rated Holding Torque (2021-2026) & (US$/Unit)
Table 20. Global Robot Joint Electromagnetic Brakes Sale by Application (2021-2026) & (K Units)
Table 21. Global Robot Joint Electromagnetic Brakes Sale Market Share by Application (2021-2026)

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Table 22. Global Robot Joint Electromagnetic Brakes Revenue by Application (2021-2026) & ($ million)
Table 23. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Application (2021-2026)
Table 24. Global Robot Joint Electromagnetic Brakes Sale Price by Application (2021-2026) & (US$/Unit)
Table 25. Global Robot Joint Electromagnetic Brakes Sales by Company (2021-2026) & (K Units)
Table 26. Global Robot Joint Electromagnetic Brakes Sales Market Share by Company (2021-2026)
Table 27. Global Robot Joint Electromagnetic Brakes Revenue by Company (2021-2026) & ($ millions)
Table 28. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Company (2021-2026)
Table 29. Global Robot Joint Electromagnetic Brakes Sale Price by Company (2021-2026) & (US$/Unit)
Table 30. Key Manufacturers Robot Joint Electromagnetic Brakes Producing Area Distribution and Sales Area
Table 31. Players Robot Joint Electromagnetic Brakes Products Offered
Table 32. Robot Joint Electromagnetic Brakes Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 33. New Products and Potential Entrants
Table 34. Market M&A Activity & Strategy
Table 35. Global Robot Joint Electromagnetic Brakes Sales by Geographic Region (2021-2026) & (K Units)
Table 36. Global Robot Joint Electromagnetic Brakes Sales Market Share Geographic Region (2021-2026)
Table 37. Global Robot Joint Electromagnetic Brakes Revenue by Geographic Region (2021-2026) & ($ millions)
Table 38. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Geographic Region (2021-2026)
Table 39. Global Robot Joint Electromagnetic Brakes Sales by Country/Region (2021-2026) & (K Units)
Table 40. Global Robot Joint Electromagnetic Brakes Sales Market Share by Country/Region (2021-2026)
Table 41. Global Robot Joint Electromagnetic Brakes Revenue by Country/Region (2021-2026) & ($ millions)
Table 42. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Country/Region (2021-2026)

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Table 43. Americas Robot Joint Electromagnetic Brakes Sales by Country (2021-2026) & (K Units)
Table 44. Americas Robot Joint Electromagnetic Brakes Sales Market Share by Country (2021-2026)
Table 45. Americas Robot Joint Electromagnetic Brakes Revenue by Country (2021-2026) & ($ millions)
Table 46. Americas Robot Joint Electromagnetic Brakes Sales by Type (2021-2026) & (K Units)
Table 47. Americas Robot Joint Electromagnetic Brakes Sales by Application (2021-2026) & (K Units)
Table 48. APAC Robot Joint Electromagnetic Brakes Sales by Region (2021-2026) & (K Units)
Table 49. APAC Robot Joint Electromagnetic Brakes Sales Market Share by Region (2021-2026)
Table 50. APAC Robot Joint Electromagnetic Brakes Revenue by Region (2021-2026) & ($ millions)
Table 51. APAC Robot Joint Electromagnetic Brakes Sales by Type (2021-2026) & (K Units)
Table 52. APAC Robot Joint Electromagnetic Brakes Sales by Application (2021-2026) & (K Units)
Table 53. Europe Robot Joint Electromagnetic Brakes Sales by Country (2021-2026) & (K Units)
Table 54. Europe Robot Joint Electromagnetic Brakes Revenue by Country (2021-2026) & ($ millions)
Table 55. Europe Robot Joint Electromagnetic Brakes Sales by Type (2021-2026) & (K Units)
Table 56. Europe Robot Joint Electromagnetic Brakes Sales by Application (2021-2026) & (K Units)
Table 57. Middle East & Africa Robot Joint Electromagnetic Brakes Sales by Country (2021-2026) & (K Units)
Table 58. Middle East & Africa Robot Joint Electromagnetic Brakes Revenue Market Share by Country (2021-2026)
Table 59. Middle East & Africa Robot Joint Electromagnetic Brakes Sales by Type (2021-2026) & (K Units)
Table 60. Middle East & Africa Robot Joint Electromagnetic Brakes Sales by Application (2021-2026) & (K Units)
Table 61. Key Market Drivers & Growth Opportunities of Robot Joint Electromagnetic Brakes
Table 62. Key Market Challenges & Risks of Robot Joint Electromagnetic Brakes

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Table 63. Key Industry Trends of Robot Joint Electromagnetic Brakes
Table 64. Robot Joint Electromagnetic Brakes Raw Material
Table 65. Key Suppliers of Raw Materials
Table 66. Robot Joint Electromagnetic Brakes Distributors List
Table 67. Robot Joint Electromagnetic Brakes Customer List
Table 68. Global Robot Joint Electromagnetic Brakes Sales Forecast by Region (2027-2032) & (K Units)
Table 69. Global Robot Joint Electromagnetic Brakes Revenue Forecast by Region (2027-2032) & ($ millions)
Table 70. Americas Robot Joint Electromagnetic Brakes Sales Forecast by Country (2027-2032) & (K Units)
Table 71. Americas Robot Joint Electromagnetic Brakes Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 72. APAC Robot Joint Electromagnetic Brakes Sales Forecast by Region (2027-2032) & (K Units)
Table 73. APAC Robot Joint Electromagnetic Brakes Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 74. Europe Robot Joint Electromagnetic Brakes Sales Forecast by Country (2027-2032) & (K Units)
Table 75. Europe Robot Joint Electromagnetic Brakes Revenue Forecast by Country (2027-2032) & ($ millions)
Table 76. Middle East & Africa Robot Joint Electromagnetic Brakes Sales Forecast by Country (2027-2032) & (K Units)
Table 77. Middle East & Africa Robot Joint Electromagnetic Brakes Revenue Forecast by Country (2027-2032) & ($ millions)
Table 78. Global Robot Joint Electromagnetic Brakes Sales Forecast by Type (2027-2032) & (K Units)
Table 79. Global Robot Joint Electromagnetic Brakes Revenue Forecast by Type (2027-2032) & ($ millions)
Table 80. Global Robot Joint Electromagnetic Brakes Sales Forecast by Application (2027-2032) & (K Units)
Table 81. Global Robot Joint Electromagnetic Brakes Revenue Forecast by Application (2027-2032) & ($ millions)
Table 82. OGURA CLUTCH CO.,LTD. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 83. OGURA CLUTCH CO.,LTD. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 84. OGURA CLUTCH CO.,LTD. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

+357 96 030922
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Table 85. OGURA CLUTCH CO.,LTD. Main Business
Table 86. OGURA CLUTCH CO.,LTD. Latest Developments
Table 87. Kendrion N.V. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 88. Kendrion N.V. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 89. Kendrion N.V. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 90. Kendrion N.V. Main Business
Table 91. Kendrion N.V. Latest Developments
Table 92. Chr. Mayr GmbH + Co. KG Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 93. Chr. Mayr GmbH + Co. KG Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 94. Chr. Mayr GmbH + Co. KG Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 95. Chr. Mayr GmbH + Co. KG Main Business
Table 96. Chr. Mayr GmbH + Co. KG Latest Developments
Table 97. Regal Rexnord Corporation Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 98. Regal Rexnord Corporation Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 99. Regal Rexnord Corporation Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 100. Regal Rexnord Corporation Main Business
Table 101. Regal Rexnord Corporation Latest Developments
Table 102. KEB Automation KG Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 103. KEB Automation KG Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 104. KEB Automation KG Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 105. KEB Automation KG Main Business
Table 106. KEB Automation KG Latest Developments
Table 107. Miki Pulley Co., Ltd. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 108. Miki Pulley Co., Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 109. Miki Pulley Co., Ltd. Robot Joint Electromagnetic Brakes Sales (K Units),

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Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 110. Miki Pulley Co., Ltd. Main Business
Table 111. Miki Pulley Co., Ltd. Latest Developments
Table 112. REACH Machinery Co., Ltd. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 113. REACH Machinery Co., Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 114. REACH Machinery Co., Ltd. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 115. REACH Machinery Co., Ltd. Main Business
Table 116. REACH Machinery Co., Ltd. Latest Developments
Table 117. PRECIMA Magnettechnik GmbH Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 118. PRECIMA Magnettechnik GmbH Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 119. PRECIMA Magnettechnik GmbH Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 120. PRECIMA Magnettechnik GmbH Main Business
Table 121. PRECIMA Magnettechnik GmbH Latest Developments
Table 122. SINFONIA TECHNOLOGY CO., LTD. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 123. SINFONIA TECHNOLOGY CO., LTD. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 124. SINFONIA TECHNOLOGY CO., LTD. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 125. SINFONIA TECHNOLOGY CO., LTD. Main Business
Table 126. SINFONIA TECHNOLOGY CO., LTD. Latest Developments
Table 127. Chengdu CDC Technology Co., Ltd. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 128. Chengdu CDC Technology Co., Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 129. Chengdu CDC Technology Co., Ltd. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 130. Chengdu CDC Technology Co., Ltd. Main Business
Table 131. Chengdu CDC Technology Co., Ltd. Latest Developments
Table 132. Nexen Group, Inc. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 133. Nexen Group, Inc. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications

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Table 134. Nexen Group, Inc. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 135. Nexen Group, Inc. Main Business
Table 136. Nexen Group, Inc. Latest Developments
Table 137. Suzhou Caiyi Power Technology Co., Ltd. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 138. Suzhou Caiyi Power Technology Co., Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 139. Suzhou Caiyi Power Technology Co., Ltd. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 140. Suzhou Caiyi Power Technology Co., Ltd. Main Business
Table 141. Suzhou Caiyi Power Technology Co., Ltd. Latest Developments
Table 142. Stephenson Gobin Limited Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 143. Stephenson Gobin Limited Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 144. Stephenson Gobin Limited Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 145. Stephenson Gobin Limited Main Business
Table 146. Stephenson Gobin Limited Latest Developments
Table 147. CHAIN TAIL CO., LTD. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 148. CHAIN TAIL CO., LTD. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 149. CHAIN TAIL CO., LTD. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 150. CHAIN TAIL CO., LTD. Main Business
Table 151. CHAIN TAIL CO., LTD. Latest Developments
Table 152. Maschinenfabrik M?nninghoff GmbH & Co. KG Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 153. Maschinenfabrik M?nninghoff GmbH & Co. KG Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 154. Maschinenfabrik M?nninghoff GmbH & Co. KG Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 155. Maschinenfabrik M?nninghoff GmbH & Co. KG Main Business
Table 156. Maschinenfabrik M?nninghoff GmbH & Co. KG Latest Developments
Table 157. Temporiti S.r.l. Basic Information, Robot Joint Electromagnetic Brakes

Manufacturing Base, Sales Area and Its Competitors
Table 158. Temporiti S.r.l. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 159. Temporiti S.r.l. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 160. Temporiti S.r.l. Main Business
Table 161. Temporiti S.r.l. Latest Developments
Table 162. ???????? Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 163. ???????? Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 164. ???????? Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 165. ???????? Main Business
Table 166. ???????? Latest Developments
Table 167. Kunshan Ankoncn Development Equipment Co.,Ltd. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 168. Kunshan Ankoncn Development Equipment Co.,Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 169. Kunshan Ankoncn Development Equipment Co.,Ltd. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 170. Kunshan Ankoncn Development Equipment Co.,Ltd. Main Business
Table 171. Kunshan Ankoncn Development Equipment Co.,Ltd. Latest Developments
Table 172. Zhuji Shi Xiaomu Keji Youxian Gongsi Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 173. Zhuji Shi Xiaomu Keji Youxian Gongsi Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 174. Zhuji Shi Xiaomu Keji Youxian Gongsi Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 175. Zhuji Shi Xiaomu Keji Youxian Gongsi Main Business
Table 176. Zhuji Shi Xiaomu Keji Youxian Gongsi Latest Developments
Table 177. Emco Dynatorq Pvt. Ltd. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 178. Emco Dynatorq Pvt. Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 179. Emco Dynatorq Pvt. Ltd. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

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Table 180. Emco Dynatorq Pvt. Ltd. Main Business
Table 181. Emco Dynatorq Pvt. Ltd. Latest Developments
Table 182. Shanghai Qichuang Electronic Technology Co., Ltd. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 183. Shanghai Qichuang Electronic Technology Co., Ltd. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 184. Shanghai Qichuang Electronic Technology Co., Ltd. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 185. Shanghai Qichuang Electronic Technology Co., Ltd. Main Business
Table 186. Shanghai Qichuang Electronic Technology Co., Ltd. Latest Developments
Table 187. St?we Switzerland AG Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 188. St?we Switzerland AG Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 189. St?we Switzerland AG Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 190. St?we Switzerland AG Main Business
Table 191. St?we Switzerland AG Latest Developments
Table 192. SEPAC Inc. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 193. SEPAC Inc. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 194. SEPAC Inc. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 195. SEPAC Inc. Main Business
Table 196. SEPAC Inc. Latest Developments
Table 197. CARLYLE JOHNSON MACHINE COMPANY, LLC. Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 198. CARLYLE JOHNSON MACHINE COMPANY, LLC. Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 199. CARLYLE JOHNSON MACHINE COMPANY, LLC. Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 200. CARLYLE JOHNSON MACHINE COMPANY, LLC. Main Business
Table 201. CARLYLE JOHNSON MACHINE COMPANY, LLC. Latest Developments
Table 202. Electroid Company Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors

+357 96 030922
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Table 203. Electroid Company Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 204. Electroid Company Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 205. Electroid Company Main Business
Table 206. Electroid Company Latest Developments
Table 207. KNOTT VORTEX PRIVATE LIMITED Basic Information, Robot Joint Electromagnetic Brakes Manufacturing Base, Sales Area and Its Competitors
Table 208. KNOTT VORTEX PRIVATE LIMITED Robot Joint Electromagnetic Brakes Product Portfolios and Specifications
Table 209. KNOTT VORTEX PRIVATE LIMITED Robot Joint Electromagnetic Brakes Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 210. KNOTT VORTEX PRIVATE LIMITED Main Business
Table 211. KNOTT VORTEX PRIVATE LIMITED Latest Developments

+357 96 030922
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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Robot Joint Electromagnetic Brakes
Figure 2. Robot Joint Electromagnetic Brakes Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Robot Joint Electromagnetic Brakes Sales Growth Rate 2021-2032 (K Units)
Figure 7. Global Robot Joint Electromagnetic Brakes Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Robot Joint Electromagnetic Brakes Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Robot Joint Electromagnetic Brakes Sales Market Share by Country/Region (2025)
Figure 10. Robot Joint Electromagnetic Brakes Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Spring-Applied Electromagnetic Brake
Figure 12. Product Picture of Permanent Magnet Brake
Figure 13. Product Picture of Other
Figure 14. Global Robot Joint Electromagnetic Brakes Sales Market Share by Type in 2026
Figure 15. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Type (2021-2026)
Figure 16. Product Picture of ?1 Nm
Figure 17. Product Picture of >1–10 Nm
Figure 18. Product Picture of >10–100 Nm
Figure 19. Product Picture of >100 Nm
Figure 20. Global Robot Joint Electromagnetic Brakes Sales Market Share by Rated Holding Torque in 2026
Figure 21. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Rated Holding Torque (2021-2026)
Figure 22. Robot Joint Electromagnetic Brakes Consumed in Conventional Industrial Articulated Robot Joints
Figure 23. Global Robot Joint Electromagnetic Brakes Market: Conventional Industrial Articulated Robot Joints (2021-2026) & (K Units)
Figure 24. Robot Joint Electromagnetic Brakes Consumed in Collaborative Robot Joints

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Figure 25. Global Robot Joint Electromagnetic Brakes Market: Collaborative Robot Joints (2021-2026) & (K Units)
Figure 26. Robot Joint Electromagnetic Brakes Consumed in Humanoid Robot Joints
Figure 27. Global Robot Joint Electromagnetic Brakes Market: Humanoid Robot Joints (2021-2026) & (K Units)
Figure 28. Robot Joint Electromagnetic Brakes Consumed in Surgical Robot Manipulator Joints
Figure 29. Global Robot Joint Electromagnetic Brakes Market: Surgical Robot Manipulator Joints (2021-2026) & (K Units)
Figure 30. Robot Joint Electromagnetic Brakes Consumed in SCARA Robot Axes
Figure 31. Global Robot Joint Electromagnetic Brakes Market: SCARA Robot Axes (2021-2026) & (K Units)
Figure 32. Robot Joint Electromagnetic Brakes Consumed in Other
Figure 33. Global Robot Joint Electromagnetic Brakes Market: Other (2021-2026) & (K Units)
Figure 34. Global Robot Joint Electromagnetic Brakes Sale Market Share by Application (2025)
Figure 35. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Application in 2025
Figure 36. Robot Joint Electromagnetic Brakes Sales by Company in 2025 (K Units)
Figure 37. Global Robot Joint Electromagnetic Brakes Sales Market Share by Company in 2025
Figure 38. Robot Joint Electromagnetic Brakes Revenue by Company in 2025 ($ millions)
Figure 39. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Company in 2025
Figure 40. Global Robot Joint Electromagnetic Brakes Sales Market Share by Geographic Region (2021-2026)
Figure 41. Global Robot Joint Electromagnetic Brakes Revenue Market Share by Geographic Region in 2025
Figure 42. Americas Robot Joint Electromagnetic Brakes Sales 2021-2026 (K Units)
Figure 43. Americas Robot Joint Electromagnetic Brakes Revenue 2021-2026 ($ millions)
Figure 44. APAC Robot Joint Electromagnetic Brakes Sales 2021-2026 (K Units)
Figure 45. APAC Robot Joint Electromagnetic Brakes Revenue 2021-2026 ($ millions)
Figure 46. Europe Robot Joint Electromagnetic Brakes Sales 2021-2026 (K Units)
Figure 47. Europe Robot Joint Electromagnetic Brakes Revenue 2021-2026 ($ millions)
Figure 48. Middle East & Africa Robot Joint Electromagnetic Brakes Sales 2021-2026 (K Units)

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Figure 49. Middle East & Africa Robot Joint Electromagnetic Brakes Revenue 2021-2026 ($ millions)
Figure 50. Americas Robot Joint Electromagnetic Brakes Sales Market Share by Country in 2025
Figure 51. Americas Robot Joint Electromagnetic Brakes Revenue Market Share by Country (2021-2026)
Figure 52. Americas Robot Joint Electromagnetic Brakes Sales Market Share by Type (2021-2026)
Figure 53. Americas Robot Joint Electromagnetic Brakes Sales Market Share by Application (2021-2026)
Figure 54. United States Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 55. Canada Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 56. Mexico Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 57. Brazil Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 58. APAC Robot Joint Electromagnetic Brakes Sales Market Share by Region in 2025
Figure 59. APAC Robot Joint Electromagnetic Brakes Revenue Market Share by Region (2021-2026)
Figure 60. APAC Robot Joint Electromagnetic Brakes Sales Market Share by Type (2021-2026)
Figure 61. APAC Robot Joint Electromagnetic Brakes Sales Market Share by Application (2021-2026)
Figure 62. China Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 63. Japan Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 64. South Korea Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 65. Southeast Asia Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 66. India Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 67. Australia Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 68. China Taiwan Robot Joint Electromagnetic Brakes Revenue Growth

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2021-2026 ($ millions)
Figure 69. Europe Robot Joint Electromagnetic Brakes Sales Market Share by Country in 2025
Figure 70. Europe Robot Joint Electromagnetic Brakes Revenue Market Share by Country (2021-2026)
Figure 71. Europe Robot Joint Electromagnetic Brakes Sales Market Share by Type (2021-2026)
Figure 72. Europe Robot Joint Electromagnetic Brakes Sales Market Share by Application (2021-2026)
Figure 73. Germany Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 74. France Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 75. UK Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 76. Italy Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 77. Russia Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 78. Middle East & Africa Robot Joint Electromagnetic Brakes Sales Market Share by Country (2021-2026)
Figure 79. Middle East & Africa Robot Joint Electromagnetic Brakes Sales Market Share by Type (2021-2026)
Figure 80. Middle East & Africa Robot Joint Electromagnetic Brakes Sales Market Share by Application (2021-2026)
Figure 81. Egypt Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 82. South Africa Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 83. Israel Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 84. Turkey Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 85. GCC Countries Robot Joint Electromagnetic Brakes Revenue Growth 2021-2026 ($ millions)
Figure 86. Manufacturing Cost Structure Analysis of Robot Joint Electromagnetic Brakes in 2026
Figure 87. Manufacturing Process Analysis of Robot Joint Electromagnetic Brakes
Figure 88. Industry Chain Structure of Robot Joint Electromagnetic Brakes

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Figure 89. Channels of Distribution
Figure 90. Global Robot Joint Electromagnetic Brakes Sales Market Forecast by Region (2027-2032)
Figure 91. Global Robot Joint Electromagnetic Brakes Revenue Market Share Forecast by Region (2027-2032)
Figure 92. Global Robot Joint Electromagnetic Brakes Sales Market Share Forecast by Type (2027-2032)
Figure 93. Global Robot Joint Electromagnetic Brakes Revenue Market Share Forecast by Type (2027-2032)
Figure 94. Global Robot Joint Electromagnetic Brakes Sales Market Share Forecast by Application (2027-2032)
Figure 95. Global Robot Joint Electromagnetic Brakes Revenue Market Share Forecast by Application (2027-2032)

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