

Global Rotary Actuators for Robotics Market Growth 2026-2032

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Abstracts

The global Rotary Actuators for Robotics market size is predicted to grow from US\$ 2406 million in 2025 to US\$ 6270 million in 2032; it is expected to grow at a CAGR of 14.7% from 2026 to 2032.

Rotary actuators for robotics are mechatronic motion units designed for robot joints and rotary axes, with controlled angular displacement and torque output as their core functions. A typical unit combines a brushless servo motor with a strain-wave, planetary, cycloidal, or direct-drive transmission architecture, together with bearings, encoders, and optional integrated drives, brakes, and torque sensors. Products are available in hollow-shaft and non-hollow-shaft configurations and generally support closed-loop position, velocity, and torque control through interfaces such as CAN or EtherCAT. This study focuses on rotary actuators procured as independent units for joints in industrial robots, mobile robots, medical and rehabilitation robots, commercial service robots, and special-purpose robotic systems. Key purchasing and engineering parameters include peak and rated torque, torque density, backlash, efficiency, speed, positioning accuracy, thermal capability, reliability, and integration level. The market sits at the intersection of precision gearing, servo motors, sensing, and motion control, with an estimated industry-wide comprehensive gross margin of approximately 38%.

Market Trends

Rotary actuators for robotics are shifting from separately sourced motors, reducers, and encoders toward highly integrated joint modules. Hollow cable routing, dual encoders, torque sensing, brakes, motor drives, and communications are increasingly combined in compact housings. Low-ratio planetary and quasi-direct-drive architectures are gaining ground in dynamic mobile and humanoid robots, while strain-wave designs retain an

advantage in precision joints requiring low backlash and high reduction ratios. Higher torque density, lower mass and inertia, improved thermal management, and support for real-time buses such as CAN FD and EtherCAT are becoming the main directions of product development.

Drivers

Upgrades in manufacturing automation, rising labor costs, expansion of warehouse and logistics robots, and development of embodied-AI and humanoid platforms are expanding demand for joint actuation. Standardized rotary actuators reduce duplicated motor, gearbox, sensing, and controller development for robot OEMs and can shorten prototype iteration and volume-production introduction cycles.

Restraints

Precision reducers, thin-section bearings, high-performance magnetic materials, encoders, and torque sensors remain meaningful cost contributors. The tradeoff between high torque and low mass also complicates thermal design and lifetime validation. Some high-end applications require lengthy reliability, functional-safety, and certification processes, slowing entry by newer suppliers.

Opportunities

Humanoid robots, mobile manipulators, warehouse handling robots, rehabilitation and surgical robots, and outdoor inspection robots are creating new demand for modular joints. Actuator platforms with standardized mechanical interfaces, common communications, and scalable control software are better positioned for reuse across multiple robot models and higher-volume procurement.

Challenges

Gear life, backlash retention, bearing stiffness, and thermal derating under high-speed impact and frequent reversing loads remain core engineering challenges. As robot OEMs increase vertical integration, independent suppliers must sustain differentiation across torque density, control algorithms, reliability validation, interface ecosystems, and manufacturing cost.

Industry Chain Analysis

Upstream inputs include permanent-magnet materials, copper and electrical steel, frameless and servo motors, strain-wave, planetary and cycloidal reducers, precision bearings, encoders, torque sensors, power electronics and controllers, brakes, and structural components. Midstream suppliers integrate mechanical, motor, sensing, and drive-control systems and perform assembly, calibration, and lifetime testing. Downstream customers include industrial robot, mobile robot, medical and rehabilitation robot, commercial service robot, and special-purpose robot manufacturers and system integrators. Value is concentrated in precision transmission, motor power density, sensing and control, thermal management, and production consistency, while scale manufacturing is critical to cost competitiveness in the midrange market.

Segment Insights

By transmission type, planetary and low-ratio architectures are well suited to legged and mobile joints requiring impact tolerance, high dynamics, and backdrivability. Strain-wave designs remain strong in compact, low-backlash, high-ratio joints; cycloidal designs favor higher load and rigidity; and direct-drive designs offer low backlash and fast response but place greater demands on motor size, continuous torque, and cooling. Torque classes separate small distal joints from arm, leg, waist, and heavy industrial axes, while hollow-shaft and integrated-drive configurations continue to gain adoption.

Downstream Market Opportunities

Manufacturing and industrial automation retain the largest installed base and stable replacement demand, while logistics and warehousing add growth from mobile manipulation, sorting, and material handling systems with stronger requirements for impact tolerance and cost. Healthcare and rehabilitation applications place greater emphasis on low noise, smooth motion, safety redundancy, and certification, while commercial services and defense and public safety applications value lightweight construction, environmental robustness, and serviceability, creating differentiated higher-value opportunities.

Regional Insights

Asia-Pacific is the most concentrated region for robot manufacturing and new deployments. China combines large robot production volumes, a broad component supply chain, and active investment in humanoid robotics, while Japan and South Korea have strong foundations in precision motion components and robot manufacturing. Europe emphasizes high-precision industrial automation, collaborative robotics, medical

equipment, and functional safety, while North America remains active in AI robotics, warehouse automation, and new mobile and humanoid platforms. Supply-chain localization and regional volume-production capability will increasingly affect customer qualification.

Competitive Landscape Analysis

Competition is led by two broad supplier groups: established motion-control companies with deep expertise in precision gearing, servo motors, and industrial reliability, and integrated-actuator specialists built around modular robotics. Established suppliers are stronger in lifetime performance, precision, and industrial qualification, while specialists tend to compete on integration, software interfaces, fast iteration, and cost. Future differentiation will center on torque density, backlash, efficiency, thermal performance, lifetime, safety functions, communications compatibility, and volume pricing, while increasing vertical integration by robot OEMs will pressure standalone actuator suppliers to deliver clearer system-level value.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Rotary Actuators for Robotics 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 Rotary Actuators for Robotics.

This report presents a comprehensive overview, market shares, and growth opportunities of Rotary Actuators for Robotics market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Strain-Wave Actuators

Planetary Gear Actuators

Cycloidal Gear Actuators

Direct-Drive Actuators

Other Actuators

Segmentation by Peak Torque:

?20 Nm

>20–50 Nm

>50–100 Nm

>100 Nm

Segmentation by Center Bore:

Hollow-Shaft Actuators

Non-Hollow-Shaft Actuators

Segmentation by Drive Integration:

Integrated-Drive Actuators

External-Drive Actuators

Segmentation by Application:

Manufacturing and Industrial Automation

Logistics and Warehousing

Healthcare and Rehabilitation

Commercial Services

Defense and Public Safety

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.

Harmonic Drive Systems

Nabtesco

Nidec Drive Technology

Maxon

ROBOTIS

HEBI Robotics

Wittenstein

Synapticon

MAB Robotics

Nanchang Kude Intelligent Technology

Suzhou Micro Actuator Technology

RobStride Dynamics

Oriental Motor

Key Questions Addressed in this Report

What is the 10-year outlook for the global Rotary Actuators for Robotics market?

What factors are driving Rotary Actuators for Robotics market growth, globally and by region?

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

How do Rotary Actuators for Robotics market opportunities vary by end market size?

How does Rotary Actuators for Robotics break out by Type, by Application?

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 Rotary Actuators for Robotics Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Rotary Actuators for Robotics by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Rotary Actuators for Robotics by Country/Region, 2021, 2025 & 2032
- 2.2 Rotary Actuators for Robotics Segment by Type
 - 2.2.1 Strain-Wave Actuators
 - 2.2.2 Planetary Gear Actuators
 - 2.2.3 Cycloidal Gear Actuators
 - 2.2.4 Direct-Drive Actuators
 - 2.2.5 Other Actuators
 - 2.2.6 Rotary Actuators for Robotics Sales by Type
 - 2.2.6.1 Global Rotary Actuators for Robotics Sales Market Share by Type (2021-2026)
 - 2.2.6.2 Global Rotary Actuators for Robotics Revenue and Market Share by Type (2021-2026)
 - 2.2.6.3 Global Rotary Actuators for Robotics Sale Price by Type (2021-2026)
- 2.3 Rotary Actuators for Robotics Segment by Peak Torque
 - 2.3.1 ≤20 Nm
 - 2.3.2 >20–50 Nm
 - 2.3.3 >50–100 Nm
 - 2.3.4 >100 Nm
 - 2.3.5 Rotary Actuators for Robotics Sales by Peak Torque

2.3.5.1 Global Rotary Actuators for Robotics Sales Market Share by Peak Torque (2021-2026)

2.3.5.2 Global Rotary Actuators for Robotics Revenue and Market Share by Peak Torque (2021-2026)

2.3.5.3 Global Rotary Actuators for Robotics Sale Price by Peak Torque (2021-2026)

2.4 Rotary Actuators for Robotics Segment by Center Bore

2.4.1 Hollow-Shaft Actuators

2.4.2 Non-Hollow-Shaft Actuators

2.4.3 Rotary Actuators for Robotics Sales by Center Bore

2.4.3.1 Global Rotary Actuators for Robotics Sales Market Share by Center Bore (2021-2026)

2.4.3.2 Global Rotary Actuators for Robotics Revenue and Market Share by Center Bore (2021-2026)

2.4.3.3 Global Rotary Actuators for Robotics Sale Price by Center Bore (2021-2026)

2.5 Rotary Actuators for Robotics Segment by Drive Integration

2.5.1 Integrated-Drive Actuators

2.5.2 External-Drive Actuators

2.5.3 Rotary Actuators for Robotics Sales by Drive Integration

2.5.3.1 Global Rotary Actuators for Robotics Sales Market Share by Drive Integration (2021-2026)

2.5.3.2 Global Rotary Actuators for Robotics Revenue and Market Share by Drive Integration (2021-2026)

2.5.3.3 Global Rotary Actuators for Robotics Sale Price by Drive Integration (2021-2026)

2.6 Rotary Actuators for Robotics Segment by Application

2.6.1 Manufacturing and Industrial Automation

2.6.2 Logistics and Warehousing

2.6.3 Healthcare and Rehabilitation

2.6.4 Commercial Services

2.6.5 Defense and Public Safety

2.6.6 Others

2.6.7 Rotary Actuators for Robotics Sales by Application

2.6.7.1 Global Rotary Actuators for Robotics Sale Market Share by Application (2021-2026)

2.6.7.2 Global Rotary Actuators for Robotics Revenue and Market Share by Application (2021-2026)

2.6.7.3 Global Rotary Actuators for Robotics Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Rotary Actuators for Robotics Breakdown Data by Company

3.1.1 Global Rotary Actuators for Robotics Annual Sales by Company (2021-2026)

3.1.2 Global Rotary Actuators for Robotics Sales Market Share by Company (2021-2026)

3.2 Global Rotary Actuators for Robotics Annual Revenue by Company (2021-2026)

3.2.1 Global Rotary Actuators for Robotics Revenue by Company (2021-2026)

3.2.2 Global Rotary Actuators for Robotics Revenue Market Share by Company (2021-2026)

3.3 Global Rotary Actuators for Robotics Sale Price by Company

3.4 Key Manufacturers Rotary Actuators for Robotics Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Rotary Actuators for Robotics Product Location Distribution

3.4.2 Players Rotary Actuators for Robotics Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

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 ROTARY ACTUATORS FOR ROBOTICS BY GEOGRAPHIC REGION

4.1 World Historic Rotary Actuators for Robotics Market Size by Geographic Region (2021-2026)

4.1.1 Global Rotary Actuators for Robotics Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Rotary Actuators for Robotics Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Rotary Actuators for Robotics Market Size by Country/Region (2021-2026)

4.2.1 Global Rotary Actuators for Robotics Annual Sales by Country/Region (2021-2026)

4.2.2 Global Rotary Actuators for Robotics Annual Revenue by Country/Region (2021-2026)

4.3 Americas Rotary Actuators for Robotics Sales Growth

4.4 APAC Rotary Actuators for Robotics Sales Growth

4.5 Europe Rotary Actuators for Robotics Sales Growth

4.6 Middle East & Africa Rotary Actuators for Robotics Sales Growth

5 AMERICAS

5.1 Americas Rotary Actuators for Robotics Sales by Country

5.1.1 Americas Rotary Actuators for Robotics Sales by Country (2021-2026)

5.1.2 Americas Rotary Actuators for Robotics Revenue by Country (2021-2026)

5.2 Americas Rotary Actuators for Robotics Sales by Type (2021-2026)

5.3 Americas Rotary Actuators for Robotics Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Rotary Actuators for Robotics Sales by Region

6.1.1 APAC Rotary Actuators for Robotics Sales by Region (2021-2026)

6.1.2 APAC Rotary Actuators for Robotics Revenue by Region (2021-2026)

6.2 APAC Rotary Actuators for Robotics Sales by Type (2021-2026)

6.3 APAC Rotary Actuators for Robotics 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 Rotary Actuators for Robotics by Country

7.1.1 Europe Rotary Actuators for Robotics Sales by Country (2021-2026)

7.1.2 Europe Rotary Actuators for Robotics Revenue by Country (2021-2026)

7.2 Europe Rotary Actuators for Robotics Sales by Type (2021-2026)

7.3 Europe Rotary Actuators for Robotics 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 Rotary Actuators for Robotics by Country

8.1.1 Middle East & Africa Rotary Actuators for Robotics Sales by Country (2021-2026)

8.1.2 Middle East & Africa Rotary Actuators for Robotics Revenue by Country (2021-2026)

8.2 Middle East & Africa Rotary Actuators for Robotics Sales by Type (2021-2026)

8.3 Middle East & Africa Rotary Actuators for Robotics Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

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 Rotary Actuators for Robotics

10.3 Manufacturing Process Analysis of Rotary Actuators for Robotics

10.4 Industry Chain Structure of Rotary Actuators for Robotics

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Rotary Actuators for Robotics Distributors

11.3 Rotary Actuators for Robotics Customer

12 WORLD FORECAST REVIEW FOR ROTARY ACTUATORS FOR ROBOTICS BY GEOGRAPHIC REGION

- 12.1 Global Rotary Actuators for Robotics Market Size Forecast by Region
 - 12.1.1 Global Rotary Actuators for Robotics Forecast by Region (2027-2032)
 - 12.1.2 Global Rotary Actuators for Robotics 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 Rotary Actuators for Robotics Forecast by Type (2027-2032)
- 12.7 Global Rotary Actuators for Robotics Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

- 13.1 Harmonic Drive Systems
 - 13.1.1 Harmonic Drive Systems Company Information
 - 13.1.2 Harmonic Drive Systems Rotary Actuators for Robotics Product Portfolios and Specifications
 - 13.1.3 Harmonic Drive Systems Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.1.4 Harmonic Drive Systems Main Business Overview
 - 13.1.5 Harmonic Drive Systems Latest Developments
- 13.2 Nabtesco
 - 13.2.1 Nabtesco Company Information
 - 13.2.2 Nabtesco Rotary Actuators for Robotics Product Portfolios and Specifications
 - 13.2.3 Nabtesco Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 Nabtesco Main Business Overview
 - 13.2.5 Nabtesco Latest Developments
- 13.3 Nidec Drive Technology
 - 13.3.1 Nidec Drive Technology Company Information
 - 13.3.2 Nidec Drive Technology Rotary Actuators for Robotics Product Portfolios and Specifications
 - 13.3.3 Nidec Drive Technology Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 Nidec Drive Technology Main Business Overview
 - 13.3.5 Nidec Drive Technology Latest Developments

13.4 Maxon

13.4.1 Maxon Company Information

13.4.2 Maxon Rotary Actuators for Robotics Product Portfolios and Specifications

13.4.3 Maxon Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Maxon Main Business Overview

13.4.5 Maxon Latest Developments

13.5 ROBOTIS

13.5.1 ROBOTIS Company Information

13.5.2 ROBOTIS Rotary Actuators for Robotics Product Portfolios and Specifications

13.5.3 ROBOTIS Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 ROBOTIS Main Business Overview

13.5.5 ROBOTIS Latest Developments

13.6 HEBI Robotics

13.6.1 HEBI Robotics Company Information

13.6.2 HEBI Robotics Rotary Actuators for Robotics Product Portfolios and Specifications

13.6.3 HEBI Robotics Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 HEBI Robotics Main Business Overview

13.6.5 HEBI Robotics Latest Developments

13.7 Wittenstein

13.7.1 Wittenstein Company Information

13.7.2 Wittenstein Rotary Actuators for Robotics Product Portfolios and Specifications

13.7.3 Wittenstein Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Wittenstein Main Business Overview

13.7.5 Wittenstein Latest Developments

13.8 Synapticon

13.8.1 Synapticon Company Information

13.8.2 Synapticon Rotary Actuators for Robotics Product Portfolios and Specifications

13.8.3 Synapticon Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Synapticon Main Business Overview

13.8.5 Synapticon Latest Developments

13.9 MAB Robotics

13.9.1 MAB Robotics Company Information

13.9.2 MAB Robotics Rotary Actuators for Robotics Product Portfolios and

Specifications

13.9.3 MAB Robotics Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 MAB Robotics Main Business Overview

13.9.5 MAB Robotics Latest Developments

13.10 Nanchang Kude Intelligent Technology

13.10.1 Nanchang Kude Intelligent Technology Company Information

13.10.2 Nanchang Kude Intelligent Technology Rotary Actuators for Robotics Product Portfolios and Specifications

13.10.3 Nanchang Kude Intelligent Technology Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Nanchang Kude Intelligent Technology Main Business Overview

13.10.5 Nanchang Kude Intelligent Technology Latest Developments

13.11 Suzhou Micro Actuator Technology

13.11.1 Suzhou Micro Actuator Technology Company Information

13.11.2 Suzhou Micro Actuator Technology Rotary Actuators for Robotics Product Portfolios and Specifications

13.11.3 Suzhou Micro Actuator Technology Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Suzhou Micro Actuator Technology Main Business Overview

13.11.5 Suzhou Micro Actuator Technology Latest Developments

13.12 RobStride Dynamics

13.12.1 RobStride Dynamics Company Information

13.12.2 RobStride Dynamics Rotary Actuators for Robotics Product Portfolios and Specifications

13.12.3 RobStride Dynamics Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 RobStride Dynamics Main Business Overview

13.12.5 RobStride Dynamics Latest Developments

13.13 Oriental Motor

13.13.1 Oriental Motor Company Information

13.13.2 Oriental Motor Rotary Actuators for Robotics Product Portfolios and Specifications

13.13.3 Oriental Motor Rotary Actuators for Robotics Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Oriental Motor Main Business Overview

13.13.5 Oriental Motor Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Rotary Actuators for Robotics Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Rotary Actuators for Robotics Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Strain-Wave Actuators

Table 4. Major Players of Planetary Gear Actuators

Table 5. Major Players of Cycloidal Gear Actuators

Table 6. Major Players of Direct-Drive Actuators

Table 7. Major Players of Other Actuators

Table 8. Global Rotary Actuators for Robotics Sales by Type (2021-2026) & (Units)

Table 9. Global Rotary Actuators for Robotics Sales Market Share by Type (2021-2026)

Table 10. Global Rotary Actuators for Robotics Revenue by Type (2021-2026) & (\$ million)

Table 11. Global Rotary Actuators for Robotics Revenue Market Share by Type (2021-2026)

Table 12. Global Rotary Actuators for Robotics Sale Price by Type (2021-2026) & (US\$/Unit)

Table 13. Major Players of ≤20 Nm

Table 14. Major Players of >20–50 Nm

Table 15. Major Players of >50–100 Nm

Table 16. Major Players of >100 Nm

Table 17. Global Rotary Actuators for Robotics Sales by Peak Torque (2021-2026) & (Units)

Table 18. Global Rotary Actuators for Robotics Sales Market Share by Peak Torque (2021-2026)

Table 19. Global Rotary Actuators for Robotics Revenue by Peak Torque (2021-2026) & (\$ million)

Table 20. Global Rotary Actuators for Robotics Revenue Market Share by Peak Torque (2021-2026)

Table 21. Global Rotary Actuators for Robotics Sale Price by Peak Torque (2021-2026) & (US\$/Unit)

Table 22. Major Players of Hollow-Shaft Actuators

Table 23. Major Players of Non-Hollow-Shaft Actuators

Table 24. Global Rotary Actuators for Robotics Sales by Center Bore (2021-2026) & (Units)

Table 25. Global Rotary Actuators for Robotics Sales Market Share by Center Bore (2021-2026)

Table 26. Global Rotary Actuators for Robotics Revenue by Center Bore (2021-2026) & (\$ million)

Table 27. Global Rotary Actuators for Robotics Revenue Market Share by Center Bore (2021-2026)

Table 28. Global Rotary Actuators for Robotics Sale Price by Center Bore (2021-2026) & (US\$/Unit)

Table 29. Major Players of Integrated-Drive Actuators

Table 30. Major Players of External-Drive Actuators

Table 31. Global Rotary Actuators for Robotics Sales by Drive Integration (2021-2026) & (Units)

Table 32. Global Rotary Actuators for Robotics Sales Market Share by Drive Integration (2021-2026)

Table 33. Global Rotary Actuators for Robotics Revenue by Drive Integration (2021-2026) & (\$ million)

Table 34. Global Rotary Actuators for Robotics Revenue Market Share by Drive Integration (2021-2026)

Table 35. Global Rotary Actuators for Robotics Sale Price by Drive Integration (2021-2026) & (US\$/Unit)

Table 36. Global Rotary Actuators for Robotics Sale by Application (2021-2026) & (Units)

Table 37. Global Rotary Actuators for Robotics Sale Market Share by Application (2021-2026)

Table 38. Global Rotary Actuators for Robotics Revenue by Application (2021-2026) & (\$ million)

Table 39. Global Rotary Actuators for Robotics Revenue Market Share by Application (2021-2026)

Table 40. Global Rotary Actuators for Robotics Sale Price by Application (2021-2026) & (US\$/Unit)

Table 41. Global Rotary Actuators for Robotics Sales by Company (2021-2026) & (Units)

Table 42. Global Rotary Actuators for Robotics Sales Market Share by Company (2021-2026)

Table 43. Global Rotary Actuators for Robotics Revenue by Company (2021-2026) & (\$ millions)

Table 44. Global Rotary Actuators for Robotics Revenue Market Share by Company (2021-2026)

Table 45. Global Rotary Actuators for Robotics Sale Price by Company (2021-2026) &

(US\$/Unit)

Table 46. Key Manufacturers Rotary Actuators for Robotics Producing Area Distribution and Sales Area

Table 47. Players Rotary Actuators for Robotics Products Offered

Table 48. Rotary Actuators for Robotics Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 49. New Products and Potential Entrants

Table 50. Market M&A Activity & Strategy

Table 51. Global Rotary Actuators for Robotics Sales by Geographic Region (2021-2026) & (Units)

Table 52. Global Rotary Actuators for Robotics Sales Market Share Geographic Region (2021-2026)

Table 53. Global Rotary Actuators for Robotics Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 54. Global Rotary Actuators for Robotics Revenue Market Share by Geographic Region (2021-2026)

Table 55. Global Rotary Actuators for Robotics Sales by Country/Region (2021-2026) & (Units)

Table 56. Global Rotary Actuators for Robotics Sales Market Share by Country/Region (2021-2026)

Table 57. Global Rotary Actuators for Robotics Revenue by Country/Region (2021-2026) & (\$ millions)

Table 58. Global Rotary Actuators for Robotics Revenue Market Share by Country/Region (2021-2026)

Table 59. Americas Rotary Actuators for Robotics Sales by Country (2021-2026) & (Units)

Table 60. Americas Rotary Actuators for Robotics Sales Market Share by Country (2021-2026)

Table 61. Americas Rotary Actuators for Robotics Revenue by Country (2021-2026) & (\$ millions)

Table 62. Americas Rotary Actuators for Robotics Sales by Type (2021-2026) & (Units)

Table 63. Americas Rotary Actuators for Robotics Sales by Application (2021-2026) & (Units)

Table 64. APAC Rotary Actuators for Robotics Sales by Region (2021-2026) & (Units)

Table 65. APAC Rotary Actuators for Robotics Sales Market Share by Region (2021-2026)

Table 66. APAC Rotary Actuators for Robotics Revenue by Region (2021-2026) & (\$ millions)

Table 67. APAC Rotary Actuators for Robotics Sales by Type (2021-2026) & (Units)

Table 68. APAC Rotary Actuators for Robotics Sales by Application (2021-2026) & (Units)

Table 69. Europe Rotary Actuators for Robotics Sales by Country (2021-2026) & (Units)

Table 70. Europe Rotary Actuators for Robotics Revenue by Country (2021-2026) & (\$ millions)

Table 71. Europe Rotary Actuators for Robotics Sales by Type (2021-2026) & (Units)

Table 72. Europe Rotary Actuators for Robotics Sales by Application (2021-2026) & (Units)

Table 73. Middle East & Africa Rotary Actuators for Robotics Sales by Country (2021-2026) & (Units)

Table 74. Middle East & Africa Rotary Actuators for Robotics Revenue Market Share by Country (2021-2026)

Table 75. Middle East & Africa Rotary Actuators for Robotics Sales by Type (2021-2026) & (Units)

Table 76. Middle East & Africa Rotary Actuators for Robotics Sales by Application (2021-2026) & (Units)

Table 77. Key Market Drivers & Growth Opportunities of Rotary Actuators for Robotics

Table 78. Key Market Challenges & Risks of Rotary Actuators for Robotics

Table 79. Key Industry Trends of Rotary Actuators for Robotics

Table 80. Rotary Actuators for Robotics Raw Material

Table 81. Key Suppliers of Raw Materials

Table 82. Rotary Actuators for Robotics Distributors List

Table 83. Rotary Actuators for Robotics Customer List

Table 84. Global Rotary Actuators for Robotics Sales Forecast by Region (2027-2032) & (Units)

Table 85. Global Rotary Actuators for Robotics Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 86. Americas Rotary Actuators for Robotics Sales Forecast by Country (2027-2032) & (Units)

Table 87. Americas Rotary Actuators for Robotics Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 88. APAC Rotary Actuators for Robotics Sales Forecast by Region (2027-2032) & (Units)

Table 89. APAC Rotary Actuators for Robotics Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 90. Europe Rotary Actuators for Robotics Sales Forecast by Country (2027-2032) & (Units)

Table 91. Europe Rotary Actuators for Robotics Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 92. Middle East & Africa Rotary Actuators for Robotics Sales Forecast by Country (2027-2032) & (Units)

Table 93. Middle East & Africa Rotary Actuators for Robotics Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 94. Global Rotary Actuators for Robotics Sales Forecast by Type (2027-2032) & (Units)

Table 95. Global Rotary Actuators for Robotics Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 96. Global Rotary Actuators for Robotics Sales Forecast by Application (2027-2032) & (Units)

Table 97. Global Rotary Actuators for Robotics Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 98. Harmonic Drive Systems Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 99. Harmonic Drive Systems Rotary Actuators for Robotics Product Portfolios and Specifications

Table 100. Harmonic Drive Systems Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 101. Harmonic Drive Systems Main Business

Table 102. Harmonic Drive Systems Latest Developments

Table 103. Nabtesco Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 104. Nabtesco Rotary Actuators for Robotics Product Portfolios and Specifications

Table 105. Nabtesco Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 106. Nabtesco Main Business

Table 107. Nabtesco Latest Developments

Table 108. Nidec Drive Technology Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 109. Nidec Drive Technology Rotary Actuators for Robotics Product Portfolios and Specifications

Table 110. Nidec Drive Technology Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 111. Nidec Drive Technology Main Business

Table 112. Nidec Drive Technology Latest Developments

Table 113. Maxon Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 114. Maxon Rotary Actuators for Robotics Product Portfolios and Specifications

Table 115. Maxon Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 116. Maxon Main Business

Table 117. Maxon Latest Developments

Table 118. ROBOTIS Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 119. ROBOTIS Rotary Actuators for Robotics Product Portfolios and Specifications

Table 120. ROBOTIS Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 121. ROBOTIS Main Business

Table 122. ROBOTIS Latest Developments

Table 123. HEBI Robotics Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 124. HEBI Robotics Rotary Actuators for Robotics Product Portfolios and Specifications

Table 125. HEBI Robotics Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 126. HEBI Robotics Main Business

Table 127. HEBI Robotics Latest Developments

Table 128. Wittenstein Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 129. Wittenstein Rotary Actuators for Robotics Product Portfolios and Specifications

Table 130. Wittenstein Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 131. Wittenstein Main Business

Table 132. Wittenstein Latest Developments

Table 133. Synapticon Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 134. Synapticon Rotary Actuators for Robotics Product Portfolios and Specifications

Table 135. Synapticon Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 136. Synapticon Main Business

Table 137. Synapticon Latest Developments

Table 138. MAB Robotics Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 139. MAB Robotics Rotary Actuators for Robotics Product Portfolios and

Specifications

Table 140. MAB Robotics Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 141. MAB Robotics Main Business

Table 142. MAB Robotics Latest Developments

Table 143. Nanchang Kude Intelligent Technology Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 144. Nanchang Kude Intelligent Technology Rotary Actuators for Robotics Product Portfolios and Specifications

Table 145. Nanchang Kude Intelligent Technology Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 146. Nanchang Kude Intelligent Technology Main Business

Table 147. Nanchang Kude Intelligent Technology Latest Developments

Table 148. Suzhou Micro Actuator Technology Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 149. Suzhou Micro Actuator Technology Rotary Actuators for Robotics Product Portfolios and Specifications

Table 150. Suzhou Micro Actuator Technology Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 151. Suzhou Micro Actuator Technology Main Business

Table 152. Suzhou Micro Actuator Technology Latest Developments

Table 153. RobStride Dynamics Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 154. RobStride Dynamics Rotary Actuators for Robotics Product Portfolios and Specifications

Table 155. RobStride Dynamics Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 156. RobStride Dynamics Main Business

Table 157. RobStride Dynamics Latest Developments

Table 158. Oriental Motor Basic Information, Rotary Actuators for Robotics Manufacturing Base, Sales Area and Its Competitors

Table 159. Oriental Motor Rotary Actuators for Robotics Product Portfolios and Specifications

Table 160. Oriental Motor Rotary Actuators for Robotics Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 161. Oriental Motor Main Business

Table 162. Oriental Motor Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Rotary Actuators for Robotics
- Figure 2. Rotary Actuators for Robotics Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Rotary Actuators for Robotics Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Rotary Actuators for Robotics Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Rotary Actuators for Robotics Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Rotary Actuators for Robotics Sales Market Share by Country/Region (2025)
- Figure 10. Rotary Actuators for Robotics Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Strain-Wave Actuators
- Figure 12. Product Picture of Planetary Gear Actuators
- Figure 13. Product Picture of Cycloidal Gear Actuators
- Figure 14. Product Picture of Direct-Drive Actuators
- Figure 15. Product Picture of Other Actuators
- Figure 16. Global Rotary Actuators for Robotics Sales Market Share by Type in 2026
- Figure 17. Global Rotary Actuators for Robotics Revenue Market Share by Type (2021-2026)
- Figure 18. Product Picture of ?20 Nm
- Figure 19. Product Picture of >20–50 Nm
- Figure 20. Product Picture of >50–100 Nm
- Figure 21. Product Picture of >100 Nm
- Figure 22. Global Rotary Actuators for Robotics Sales Market Share by Peak Torque in 2026
- Figure 23. Global Rotary Actuators for Robotics Revenue Market Share by Peak Torque (2021-2026)
- Figure 24. Product Picture of Hollow-Shaft Actuators
- Figure 25. Product Picture of Non-Hollow-Shaft Actuators
- Figure 26. Global Rotary Actuators for Robotics Sales Market Share by Center Bore in 2026
- Figure 27. Global Rotary Actuators for Robotics Revenue Market Share by Center Bore (2021-2026)

Figure 28. Product Picture of Integrated-Drive Actuators

Figure 29. Product Picture of External-Drive Actuators

Figure 30. Global Rotary Actuators for Robotics Sales Market Share by Drive Integration in 2026

Figure 31. Global Rotary Actuators for Robotics Revenue Market Share by Drive Integration (2021-2026)

Figure 32. Rotary Actuators for Robotics Consumed in Manufacturing and Industrial Automation

Figure 33. Global Rotary Actuators for Robotics Market: Manufacturing and Industrial Automation (2021-2026) & (Units)

Figure 34. Rotary Actuators for Robotics Consumed in Logistics and Warehousing

Figure 35. Global Rotary Actuators for Robotics Market: Logistics and Warehousing (2021-2026) & (Units)

Figure 36. Rotary Actuators for Robotics Consumed in Healthcare and Rehabilitation

Figure 37. Global Rotary Actuators for Robotics Market: Healthcare and Rehabilitation (2021-2026) & (Units)

Figure 38. Rotary Actuators for Robotics Consumed in Commercial Services

Figure 39. Global Rotary Actuators for Robotics Market: Commercial Services (2021-2026) & (Units)

Figure 40. Rotary Actuators for Robotics Consumed in Defense and Public Safety

Figure 41. Global Rotary Actuators for Robotics Market: Defense and Public Safety (2021-2026) & (Units)

Figure 42. Rotary Actuators for Robotics Consumed in Others

Figure 43. Global Rotary Actuators for Robotics Market: Others (2021-2026) & (Units)

Figure 44. Global Rotary Actuators for Robotics Sale Market Share by Application (2025)

Figure 45. Global Rotary Actuators for Robotics Revenue Market Share by Application in 2025

Figure 46. Rotary Actuators for Robotics Sales by Company in 2025 (Units)

Figure 47. Global Rotary Actuators for Robotics Sales Market Share by Company in 2025

Figure 48. Rotary Actuators for Robotics Revenue by Company in 2025 (\$ millions)

Figure 49. Global Rotary Actuators for Robotics Revenue Market Share by Company in 2025

Figure 50. Global Rotary Actuators for Robotics Sales Market Share by Geographic Region (2021-2026)

Figure 51. Global Rotary Actuators for Robotics Revenue Market Share by Geographic Region in 2025

Figure 52. Americas Rotary Actuators for Robotics Sales 2021-2026 (Units)

Figure 53. Americas Rotary Actuators for Robotics Revenue 2021-2026 (\$ millions)

Figure 54. APAC Rotary Actuators for Robotics Sales 2021-2026 (Units)

Figure 55. APAC Rotary Actuators for Robotics Revenue 2021-2026 (\$ millions)

Figure 56. Europe Rotary Actuators for Robotics Sales 2021-2026 (Units)

Figure 57. Europe Rotary Actuators for Robotics Revenue 2021-2026 (\$ millions)

Figure 58. Middle East & Africa Rotary Actuators for Robotics Sales 2021-2026 (Units)

Figure 59. Middle East & Africa Rotary Actuators for Robotics Revenue 2021-2026 (\$ millions)

Figure 60. Americas Rotary Actuators for Robotics Sales Market Share by Country in 2025

Figure 61. Americas Rotary Actuators for Robotics Revenue Market Share by Country (2021-2026)

Figure 62. Americas Rotary Actuators for Robotics Sales Market Share by Type (2021-2026)

Figure 63. Americas Rotary Actuators for Robotics Sales Market Share by Application (2021-2026)

Figure 64. United States Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 65. Canada Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 66. Mexico Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 67. Brazil Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 68. APAC Rotary Actuators for Robotics Sales Market Share by Region in 2025

Figure 69. APAC Rotary Actuators for Robotics Revenue Market Share by Region (2021-2026)

Figure 70. APAC Rotary Actuators for Robotics Sales Market Share by Type (2021-2026)

Figure 71. APAC Rotary Actuators for Robotics Sales Market Share by Application (2021-2026)

Figure 72. China Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 73. Japan Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 74. South Korea Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 75. Southeast Asia Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 76. India Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 77. Australia Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 78. China Taiwan Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 79. Europe Rotary Actuators for Robotics Sales Market Share by Country in 2025

Figure 80. Europe Rotary Actuators for Robotics Revenue Market Share by Country (2021-2026)

Figure 81. Europe Rotary Actuators for Robotics Sales Market Share by Type (2021-2026)

Figure 82. Europe Rotary Actuators for Robotics Sales Market Share by Application (2021-2026)

Figure 83. Germany Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 84. France Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 85. UK Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 86. Italy Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 87. Russia Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 88. Middle East & Africa Rotary Actuators for Robotics Sales Market Share by Country (2021-2026)

Figure 89. Middle East & Africa Rotary Actuators for Robotics Sales Market Share by Type (2021-2026)

Figure 90. Middle East & Africa Rotary Actuators for Robotics Sales Market Share by Application (2021-2026)

Figure 91. Egypt Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 92. South Africa Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 93. Israel Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 94. Turkey Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 95. GCC Countries Rotary Actuators for Robotics Revenue Growth 2021-2026 (\$ millions)

Figure 96. Manufacturing Cost Structure Analysis of Rotary Actuators for Robotics in 2026

Figure 97. Manufacturing Process Analysis of Rotary Actuators for Robotics

Figure 98. Industry Chain Structure of Rotary Actuators for Robotics

Figure 99. Channels of Distribution

Figure 100. Global Rotary Actuators for Robotics Sales Market Forecast by Region (2027-2032)

Figure 101. Global Rotary Actuators for Robotics Revenue Market Share Forecast by Region (2027-2032)

Figure 102. Global Rotary Actuators for Robotics Sales Market Share Forecast by Type (2027-2032)

Figure 103. Global Rotary Actuators for Robotics Revenue Market Share Forecast by Type (2027-2032)

Figure 104. Global Rotary Actuators for Robotics Sales Market Share Forecast by Application (2027-2032)

Figure 105. Global Rotary Actuators for Robotics Revenue Market Share Forecast by Application (2027-2032)

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