

Industrial Robot Motor Global Market Insights 2026, Analysis and Forecast to 2031

<https://marketpublishers.com/r/IF787B6F00E2EN.html>

Date: March 2026

Pages: 101

Price: US\$ 3,200.00 (Single User License)

ID: IF787B6F00E2EN

Abstracts

The industrial robot motor market represents the critical 'muscle' of the automation age, driving the precise movement, torque, and efficiency required by modern manufacturing. As the robotics sector undergoes a profound transformation characterized by market saturation in traditional sectors and explosive growth in emerging economies, the demand for specialized motors—including AC servos, DC brushless motors, and stepper motors—has evolved. The market is currently navigating a period of significant structural readjustment, influenced heavily by geopolitical localization trends, particularly in China, and major consolidation events among global industrial giants.

Based on current industry trajectories, the market size for industrial robot motors in 2026 is estimated to range between 0.9 billion and 1.7 billion USD. Looking forward, the market is expected to experience a period of stabilized maturity and moderate expansion, with a Compound Annual Growth Rate (CAGR) projected between 2.3% and 3.6% from 2026 through 2031. This growth profile reflects a balance between the rapid adoption of automation in logistics and new energy sectors against the cyclical headwinds facing traditional automotive manufacturing.

Regional Market Analysis

The geographical distribution of the industrial robot motor market has shifted decisively toward Asia, creating a monopolar dominance that fundamentally alters supply chain strategies for global motor manufacturers. The demand is no longer evenly distributed but is heavily concentrated in manufacturing hubs that are aggressively pursuing industrial modernization and labor substitution.

Asia Pacific: This region is the undisputed engine of the global market. In 2024,

Asia accounted for approximately 74% of new robot deployments. The centerpiece of this dominance is China, which represented 54% of global deployments with 295,000 installations in 2024 alone. China's operational robot stock has exceeded the 2 million mark, the largest of any country. A critical trend within China is the rise of domestic supply chains; for the first time, Chinese robot manufacturers have outsold foreign suppliers in their home market, claiming a 57% market share. This shift places immense pressure on international motor suppliers to localize production or face displacement by increasingly capable domestic competitors. The estimated market share for the Asia Pacific region for robot motors falls between 70% and 76%.

Europe: The European market, while technologically advanced, shows signs of maturity and saturation relative to Asia. Accounting for approximately 16% of new deployments, Europe remains a stronghold for high-precision engineering and premium motor applications. The focus here is less on volume expansion and more on retrofitting, 'Industry 4.0' integration, and specialized applications in pharmaceuticals and food processing. The estimated market share for Europe is likely between 14% and 18%.

The Americas: Representing roughly 9% of global deployments, the Americas market is driven primarily by the United States and Mexico. The demand in this region is heavily tied to the reshoring of manufacturing and the automotive sector's transition to electric vehicles. While the volume is lower than in Asia, the average selling price (ASP) of motors tends to be higher due to strict requirements for safety and software integration. The estimated market share for North America and South America combined is between 8% and 11%.

Middle East and Africa (MEA): This region remains a nascent market for industrial robotics, primarily driven by investments in Saudi Arabia and the UAE to diversify economies beyond oil. The market share is estimated to be less than 2%.

Application and Segmentation Analysis

The demand for robot motors is dictated by the specific requirements of downstream applications. Different industries demand varying levels of precision, torque density, and environmental resistance, shaping the product portfolios of motor manufacturers.

Automotive Manufacturing: Historically the largest consumer of industrial robots, the automotive sector remains a foundational pillar. However, the nature of the demand is changing. As the industry pivots to Electric Vehicle (EV) production, robot lines are being retooled. Heavy-duty payload robots used in chassis welding require high-torque AC servo motors, while final assembly lines for battery packs require smaller, highly precise motors. Despite a slowdown in internal combustion engine investment, the EV transition sustains demand.

Electronic Manufacturing (3C): The Electronics, Communication, and Computer sector is the second-largest driver. This sector demands high-speed, low-vibration, and compact motors. SCARA robots and small 6-axis articulated robots are prevalent here. The trend towards miniaturization in electronics forces motor manufacturers to develop frameless motors and direct drive technologies that reduce size without compromising power.

Metal Processing and Machinery: This segment involves harsh operating environments. Motors used in robots for grinding, polishing, and loading/unloading (machine tending) must feature high IP ratings (ingress protection) to withstand dust and coolants. Reliability and thermal management are the primary competitive factors in this segment.

Logistics and Warehousing: This is the fastest-growing segment in terms of unit volume, though often utilizing different motor specifications compared to articulated arms. The explosion of e-commerce has driven the adoption of Autonomous Mobile Robots (AMRs) and Automated Guided Vehicles (AGVs). These applications prioritize energy efficiency (to extend battery life) and compact integration. Low-voltage servo systems and brushless DC motors are witnessing a surge in demand from this sector.

Aerospace: While lower in volume, the aerospace sector commands the highest premium. Robots used for drilling composite materials or painting fuselage sections require motors with zero-backlash capabilities and extreme precision. This segment often utilizes specialized frameless motors integrated directly into the robot joints to minimize weight and maximize stiffness.

Value Chain and Supply Chain Structure

The industrial robot motor value chain is complex, characterized by a high degree of

technical specialization and an increasing trend towards vertical integration.

The upstream segment comprises raw material suppliers. Key materials include rare earth magnets (Neodymium Iron Boron - NdFeB), copper wire, and silicon steel sheets. The volatility of rare earth prices, primarily controlled by Chinese supply chains, significantly impacts the cost structure of high-performance permanent magnet synchronous motors (PMSM).

The midstream segment consists of the motor manufacturers themselves. This layer is divided into two distinct groups: specialized motor suppliers (like Maxon, Kollmorgen) who sell components to robot OEMs, and vertically integrated robot manufacturers (like Yaskawa or Fanuc, though not listed in the target group, they represent the competitive benchmark) who produce their own motors to control costs and performance. A significant trend in the midstream is the integration of the 'joint module,' where the motor, encoder, brake, and reducer are sold as a single pre-assembled unit, simplifying the supply chain for robot makers.

The downstream segment includes the robot manufacturers (OEMs) and system integrators who deploy the solutions to end-users. The recent divestiture of ABB's Robotics & Discrete Automation division to SoftBank Group for \$5.375 billion signals a major shift in this layer. It suggests a commoditization of hardware where profitability is increasingly difficult without massive scale or software differentiation.

Key Market Players and Company Developments

The competitive landscape is a mix of established Western precision engineering firms and rapidly rising Chinese manufacturers who are aggressively capturing market share through acquisition and localized innovation.

Kollmorgen: A global leader in motion control, known for its high-performance frameless motors which are critical for 'cobots' (collaborative robots) where space and weight are at a premium. Their TBM and KBM series are industry benchmarks for direct-drive applications.

Nidec: A massive Japanese conglomerate with a comprehensive portfolio ranging from small precision motors to large industrial drives. Nidec's strategy often involves aggressive M&A to consolidate the supply chain, offering complete joint solutions including their Shimpo reduction gears.

Maxon Motor and Faulhaber: These European manufacturers (Swiss and German, respectively) dominate the high-precision, small-form-factor segment. Their motors are essential for medical robotics, dexterous robotic hands, and precision electronics assembly robots where standard industrial servos are too bulky.

Shanghai Moons' Electric: A leading Chinese manufacturer known initially for stepper motors, now successfully transitioning into high-end servo systems. They represent the 'import substitution' trend in China, offering performance comparable to Tier 1 global brands at competitive price points.

Estun Automation / Xinshida (STEP Electric): While listed as robot makers, their corporate movements affect the motor market. The acquisition of a controlling stake in Xinshida by Haier Group is a strategic maneuver to compete with Midea Group (which owns Kuka). This signals that consumer electronics and appliance giants are becoming the new overlords of the robotics supply chain, likely driving internal demand for motor components.

Jiangsu Leili Motor and Jiangsu DINGS' Intelligent Control Technology: These companies specialize in linear actuators and stepper solutions, finding niches in the automation of fixtures and peripheral robotic equipment.

Shenzhen Topband and Suzhou Veichi Electric: Originally focused on general industrial automation and frequency converters, these companies have expanded into motion control and servo drives, leveraging their electronic manufacturing expertise to offer cost-effective drive-motor combinations.

Guangzhou Haozhi Industrial: This company is notable for targeting the core components bottleneck, developing harmonic reducers and integrated motor-drive units to break foreign monopolies in the robot joint market.

Market Opportunities

The market presents several strategic avenues for growth, driven by technological shifts and macroeconomic demands.

Localization and Import Substitution in China: With China's domestic market share hitting 57% and the government's push for self-sufficiency, there is a

massive opportunity for domestic motor manufacturers to displace legacy Japanese and European suppliers. International brands also have the opportunity to establish 'China-for-China' R&D centers to compete on speed and cost.

Humanoid Robotics: Although still in the early commercialization phase, the surge of interest in humanoid robots (driven by AI advancements) creates a new market for high-torque-density, lightweight motors. These robots require dozens of actuators, significantly multiplying the volume of motors needed per unit compared to a standard 6-axis arm.

Energy Efficiency Upgrades: As global manufacturing faces stricter carbon mandates, there is a replacement cycle opportunity for high-efficiency motors (IE4/IE5 standards) in industrial automation. Robots that consume less power during hold-states or regeneration cycles are becoming preferred.

Integration of Smart Sensors: The move towards predictive maintenance offers an opportunity to sell 'smart motors' equipped with vibration and thermal sensors that can communicate health status directly to the central controller, bypassing the need for external sensor arrays.

Market Challenges

Despite the growth potential, the market faces significant headwinds that could dampen profitability.

Intense Price Competition: The commoditization of standard AC servo systems has led to a price war, particularly in the Chinese market. The entry of massive conglomerates like Haier and the aggressive expansion of domestic players create a low-margin environment for mid-range products.

Geopolitical Fragmentation: The bifurcation of technology standards and supply chains between the West and China complicates operations for global players. Export controls on high-end chips or advanced manufacturing equipment can disrupt the supply chain for motor controllers and encoders.

Technical Barriers in High-End Applications: While Chinese manufacturers have captured the low-to-mid market, the ultra-high-precision segment (e.g.,

aerospace, semiconductor handling) is still dominated by European and Japanese firms. Bridging this gap requires sustained R&D investment which is difficult in a price-sensitive market.

Macroeconomic Uncertainty: The divestiture of ABB's robotics division highlights a softening in capital expenditure across major markets. When global manufacturing output slows, robot orders are often the first to be delayed, directly impacting motor suppliers.

The industrial robot motor market is in a transition phase. It is moving from a high-margin, specialized hardware market to a volume-driven, cost-competitive battlefield centered in Asia. Success in the coming five years will depend on a company's ability to navigate the Chinese ecosystem, integrate advanced software capabilities, and secure supply chains against geopolitical friction.

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