

South and Central America Precision Gearbox Market Size and Forecast (2021 - 2031)

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Abstracts

The South and Central America Precision Gearbox Market is projected to grow significantly, reaching an estimated US\$ 213.0 million by 2031, up from US\$ 131.2 million in 2024. This growth reflects a compound annual growth rate (CAGR) of 7.3% from 2025 to 2031, driven by various factors including increased investments in renewable energy and advancements in manufacturing technologies.

Executive Summary and Market Analysis

The region is witnessing a surge in investments in wind and solar energy, particularly in Brazil, which is becoming a hub for wind energy development. In August 2024, Goldwind, a leading Chinese turbine manufacturer, inaugurated its first factory outside China in Bahia, Brazil. This facility is set to produce large-scale wind turbines ranging from 5.3 to 7.5 MW, which necessitate high-performance precision gearboxes for critical functions such as yaw and pitch control. The factory's accreditation from Brazil's development bank, BNDES, under the FINAME program, facilitates local financing for projects utilizing domestically certified components, thereby boosting local manufacturing.

In January 2025, Brazil enacted a significant law to authorize and regulate offshore wind farms, marking a new phase of growth for high-capacity turbine systems and consequently increasing the demand for advanced gearbox systems designed for marine environments.

Beyond renewable energy, the mining sector remains a cornerstone of the economy in countries like Chile and Peru. In response to this, Metso Outotec has expanded its heavy equipment service centers in Antofagasta and Arequipa during 2023-2024,

enhancing local capabilities to refurbish and service large machinery such as crushers, mills, and conveyors, which rely heavily on durable, high-torque gearboxes. This trend underscores the growing emphasis on predictive maintenance and local servicing capabilities, which are essential in remote mining areas.

Brazil's local content requirements, enforced by BNDES, are reshaping supply chains by mandating domestic production of wind turbine components, including gearboxes, to qualify for public financing. This regulatory framework is encouraging localization and attracting global original equipment manufacturers (OEMs) to establish production bases or enter joint ventures in the region.

Market Trends and Developments

Manufacturing facilities in Mexico, Brazil, and Colombia are modernizing their production lines, packaging systems, and robotics to meet global quality standards and enhance competitiveness. This modernization is driving the demand for compact, efficient, and low-backlash gearboxes. In agriculture, countries like Argentina and Brazil are mechanizing operations to improve crop yields and reduce labor dependency, with precision gearboxes playing a vital role in equipment such as harvesters, tractors, and irrigation systems.

The solar sector is also experiencing growth, with significant investments like the one from China's SPIC, which allocated over BRL 780 million (approximately US\$ 144.3 million) to Brazilian wind farms and initiated solar parks in 2024. This investment signals a rising demand for electromechanical motion systems, such as solar trackers that depend on high-efficiency gearboxes.

Strategic Insights and Product Segmentation

The South and Central America Precision Gearbox Market is segmented by product type into Planetary Gearboxes, Right Angle, Parallel Shaft, and Others, with Planetary Gearboxes holding the largest market share in 2024. By application, the market is divided into sectors including Military and Aerospace, Food and Beverages, Machine Tools, Material Handling, Packaging Machines, Robotics, Medical Devices, and Others, with Robotics leading the market share in 2024.

The trend towards miniaturization and lightweight designs is increasingly influencing product development across various applications. This is particularly evident in fields such as medical robotics, surgical equipment, semiconductor handling, optical systems,

drones, and compact robotics, where space and weight constraints are critical.

For instance, in April 2023, WITTENSTEIN launched a miniaturized Galaxie gearbox that offers higher torsional rigidity and greater torque density compared to traditional strain wave gearboxes of similar size. This innovation has been recognized in the Surgical Robotics Industry Awards for its groundbreaking technology, highlighting its suitability for precision applications in limited spaces.

In October 2023, igus introduced micro-gears made from high-performance plastics, featuring extremely small gear tooth sizes, which are lightweight and require less maintenance, making them ideal for applications in microscopes and miniature drives.

Country Insights and Market Dynamics

The market is further segmented by country, with Brazil holding the largest share in 2024. The demand for planetary and harmonic gearboxes in Brazil is driven by the modernization of manufacturing processes and the push for increased automation and improved infrastructure. Agriculture remains a key industry, with the need for precise and durable gear systems in tractors, harvesters, and food processing equipment to enhance productivity.

Brazil's reliance on high-precision parts imports, currency fluctuations, and the need for cost-effective operations present challenges. However, the country's industrial scale and its transition towards automation and renewable energy are significant drivers for the precision gearbox market.

Company Profiles

Key players in the South and Central America Precision Gearbox Market include NIDEC CORPORATION, Nabtesco Corp, HIWIN Corporation, WITTENSTEIN SE, Sumitomo Corporation, HARMONIC DRIVE SYSTEMS INC., and others. These companies are pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:
- 3.3 Assumptions and Limitations

4. PRECISION GEARBOX MARKET LANDSCAPE

- 4.1 Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
- 4.4 List of Vendors in the Value Chain
- 4.5 ESG Outlook
- 4.6 Import Export Analysis
 - 4.6.1 Import Analysis, 2024
 - 4.6.2 Export Analysis, 2024
- 4.7 Average Prices by Region, 2024

5. SOUTH & CENTRAL AMERICA PRECISION GEARBOX MARKET – KEY MARKET DYNAMICS

- 5.1 South & Central America Precision Gearbox Market – Key Market Dynamics

5.2 Market Drivers

- 5.2.1 Increasing Automation and Robotics Usage
- 5.2.2 Soaring Awareness of Precision Gearbox Across Diverse Industries
- 5.2.3 Advances in Materials and Manufacturing Technologies

5.3 Market Restraints

- 5.3.1 Sensitivity to Raw Material and Supply Chain Fluctuations
- 5.3.2 Complex Manufacturing and Assembly Process

5.4 Market Opportunities

- 5.4.1 Smart Gearboxes with Sensors and Predictive Maintenance
- 5.4.2 Increasing Demand for Sustainable and Energy-Efficient Solutions

5.5 Future Trends

- 5.5.1 Adoption of Industry 4.0 Technologies
- 5.5.2 Additive Manufacturing (AM) Techniques
- 5.5.3 Development of Miniaturized and Lightweight Gearboxes

5.6 Impact of Drivers and Restraints:

6. PRECISION GEARBOX MARKET – SOUTH & CENTRAL AMERICA ANALYSIS

6.1 South & Central America Precision Gearbox Market Volume (Thousand Units), 2021–2031

6.2 South & Central America Precision Gearbox Market Volume Forecast Analysis

6.3 South & Central America Precision Gearbox Market Revenue (US\$ Million), 2021–2031

6.4 South & Central America Precision Gearbox Market Forecast Analysis

7. SOUTH & CENTRAL AMERICA PRECISION GEARBOX MARKET VOLUME AND REVENUE ANALYSIS – BY PRODUCT TYPE

7.1 Planetary Gearboxes

7.1.1 Overview

7.1.2 Planetary Gearboxes: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

7.1.3 Planetary Gearboxes: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.2 Right Angle

7.2.1 Overview

7.2.2 Right Angle: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

7.2.3 Right Angle: South & Central America Precision Gearbox Market – Revenue and

Forecast, 2021–2031 (US\$ Million)

7.3 Parallel Shaft

7.3.1 Overview

7.3.2 Parallel Shaft: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

7.3.3 Parallel Shaft: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.4 Others

7.4.1 Overview

7.4.2 Others: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

7.4.3 Others: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

8. SOUTH & CENTRAL AMERICA PRECISION GEARBOX MARKET VOLUME AND REVENUE ANALYSIS – BY APPLICATION

8.1 Military and Aerospace

8.1.1 Overview

8.1.2 Military and Aerospace: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

8.1.3 Military and Aerospace: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

8.2 Food and Beverages

8.2.1 Overview

8.2.2 Food and Beverages: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

8.2.3 Food and Beverages: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

8.3 Machine Tools

8.3.1 Overview

8.3.2 Machine Tools: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

8.3.3 Machine Tools: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

8.4 Material Handling

8.4.1 Overview

8.4.2 Material Handling: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

8.4.3 Material Handling: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

8.5 Packaging Machines

8.5.1 Overview

8.5.2 Packaging Machines: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

8.5.3 Packaging Machines: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

8.6 Robotics

8.6.1 Overview

8.6.2 Robotics: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

8.6.3 Robotics: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

8.7 Medical Devices

8.7.1 Overview

8.7.2 Medical Devices: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

8.7.3 Medical Devices: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

8.8 Others

8.8.1 Overview

8.8.2 Others: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

8.8.3 Others: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

9. SOUTH & CENTRAL AMERICA PRECISION GEARBOX MARKET – COUNTRY ANALYSIS

9.1 South & Central America

9.1.1 South & Central America Precision Gearbox Market – Volume, Revenue, and Forecast Analysis – by Country

9.1.1.1 South & Central America Precision Gearbox Market Volume and Forecast Analysis – by Country

9.1.1.2 South & Central America Precision Gearbox Market – Revenue and Forecast Analysis – by Country

9.1.1.3 Brazil: South & Central America Precision Gearbox Market – Volume, Revenue, and Forecast, 2021–2031 (US\$ Million)

9.1.1.3.1 Brazil: South & Central America Precision Gearbox Market Share – by Product Type

9.1.1.3.2 Brazil: South & Central America Precision Gearbox Market Share – by Application

9.1.1.4 Argentina: South & Central America Precision Gearbox Market – Volume, Revenue, and Forecast, 2021–2031 (US\$ Million)

9.1.1.4.1 Argentina: South & Central America Precision Gearbox Market Share – by Product Type

9.1.1.4.2 Argentina: South & Central America Precision Gearbox Market Share – by Application

9.1.1.5 Rest of South & Central America: South & Central America Precision Gearbox Market – Volume, Revenue, and Forecast, 2021–2031 (US\$ Million)

9.1.1.5.1 Rest of South & Central America: South & Central America Precision Gearbox Market Share – by Product Type

9.1.1.5.2 Rest of South & Central America: South & Central America Precision Gearbox Market Share – by Application

10. COMPETITIVE LANDSCAPE

10.1 Heat Map Analysis by Key Players

10.2 Company Positioning and Concentration

11. INDUSTRY LANDSCAPE

11.1 Overview

11.2 Market Initiative

11.3 Partnerships and Collaborations

12. COMPANY PROFILES

12.1 HARMONIC DRIVE SYSTEMS INC.

12.1.1 Key Facts

12.1.2 Business Description

12.1.3 Products and Services

12.1.4 Financial Overview

12.1.5 SWOT Analysis

12.1.6 Key Developments

12.2 NIDEC CORPORATION

12.2.1 Key Facts

- 12.2.2 Business Description
- 12.2.3 Products and Services
- 12.2.4 Financial Overview
- 12.2.5 SWOT Analysis
- 12.2.6 Key Developments
- 12.3 ST?BER Antriebstechnik GmbH + Co. KG
 - 12.3.1 Key Facts
 - 12.3.2 Business Description
 - 12.3.3 Products and Services
 - 12.3.4 Financial Overview
 - 12.3.5 SWOT Analysis
 - 12.3.6 Key Developments
- 12.4 WITTENSTEIN SE
 - 12.4.1 Key Facts
 - 12.4.2 Business Description
 - 12.4.3 Products and Services
 - 12.4.4 Financial Overview
 - 12.4.5 SWOT Analysis
 - 12.4.6 Key Developments
- 12.5 GAM Enterprises, Inc.
 - 12.5.1 Key Facts
 - 12.5.2 Business Description
 - 12.5.3 Products and Services
 - 12.5.4 Financial Overview
 - 12.5.5 SWOT Analysis
 - 12.5.6 Key Developments
- 12.6 DieQua Corporation
 - 12.6.1 Key Facts
 - 12.6.2 Business Description
 - 12.6.3 Products and Services
 - 12.6.4 Financial Overview
 - 12.6.5 SWOT Analysis
 - 12.6.6 Key Developments
- 12.7 Neugart GmbH
 - 12.7.1 Key Facts
 - 12.7.2 Business Description
 - 12.7.3 Products and Services
 - 12.7.4 Financial Overview
 - 12.7.5 SWOT Analysis

- 12.7.6 Key Developments
- 12.8 Apex Dynamics, Inc.
 - 12.8.1 Key Facts
 - 12.8.2 Business Description
 - 12.8.3 Products and Services
 - 12.8.4 Financial Overview
 - 12.8.5 SWOT Analysis
 - 12.8.6 Key Developments
- 12.9 Sumitomo Corporation
 - 12.9.1 Key Facts
 - 12.9.2 Business Description
 - 12.9.3 Products and Services
 - 12.9.4 Financial Overview
 - 12.9.5 SWOT Analysis
 - 12.9.6 Key Developments
- 12.10 BMT INTERNATIONAL N.V.
 - 12.10.1 Key Facts
 - 12.10.2 Business Description
 - 12.10.3 Products and Services
 - 12.10.4 Financial Overview
 - 12.10.5 SWOT Analysis
 - 12.10.6 Key Developments
- 12.11 Boneng Transmission Co., LTD.
 - 12.11.1 Key Facts
 - 12.11.2 Business Description
 - 12.11.3 Products and Services
 - 12.11.4 Financial Overview
 - 12.11.5 SWOT Analysis
 - 12.11.6 Key Developments
- 12.12 FT Gearing System
 - 12.12.1 Key Facts
 - 12.12.2 Business Description
 - 12.12.3 Products and Services
 - 12.12.4 Financial Overview
 - 12.12.5 SWOT Analysis
 - 12.12.6 Key Developments
- 12.13 HIWIN Corporation
 - 12.13.1 Key Facts
 - 12.13.2 Business Description

- 12.13.3 Products and Services
- 12.13.4 Financial Overview
- 12.13.5 SWOT Analysis
- 12.13.6 Key Developments
- 12.14 SEW-EURODRIVE GmbH & Co KG
 - 12.14.1 Key Facts
 - 12.14.2 Business Description
 - 12.14.3 Products and Services
 - 12.14.4 Financial Overview
 - 12.14.5 SWOT Analysis
 - 12.14.6 Key Developments
- 12.15 Nabtesco Corp
 - 12.15.1 Key Facts
 - 12.15.2 Business Description
 - 12.15.3 Products and Services
 - 12.15.4 Financial Overview
 - 12.15.5 SWOT Analysis
 - 12.15.6 Key Developments
- 12.16 G?del Group AG
 - 12.16.1 Key Facts
 - 12.16.2 Business Description
 - 12.16.3 Products and Services
 - 12.16.4 Financial Overview
 - 12.16.5 SWOT Analysis
 - 12.16.6 Key Developments

13. APPENDIX

13.1 About Us

List Of Tables

LIST OF TABLES

Table 1. South & Central America Precision Gearbox Market Segmentation
Table 2. List of Vendors
Table 3. Import Analysis, 2024
Table 4. Export Analysis, 2024
Table 5. Average Price of a single precision gearbox across Region, 2024
Table 6. South & Central America Precision Gearbox Market –Volume and Forecast, 2021–2031 (Thousand Units)
Table 7. South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)
Table 8. South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units) – by Product Type
Table 9. South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million) – by Product Type
Table 10. South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units) – by Application
Table 11. South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million) – by Application
Table 12. South & Central America Precision Gearbox Market – Volume and Forecast, 2021–2031 (Thousand Units) –by Country
Table 13. South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million) – by Country
Table 14. Brazil: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units) – by Product Type
Table 15. Brazil: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by Product Type
Table 16. Brazil: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units) – by Application
Table 17. Brazil: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by Application
Table 18. Argentina: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units) – by Product Type
Table 19. Argentina: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by Product Type
Table 20. Argentina: South & Central America Precision Gearbox Market – Volume and

Forecast, 2021 – 2031 (Thousand Units) – by Application

Table 21. Argentina: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by Application

Table 22. Rest of South & Central America: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units) – by Product Type

Table 23. Rest of South & Central America: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by Product Type

Table 24. Rest of South & Central America: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units) – by Application

Table 25. Rest of South & Central America: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by Application

List Of Figures

LIST OF FIGURES

Figure 1. South & Central America Precision Gearbox Market Segmentation – Country

Figure 2. PEST Analysis

Figure 3. Impact Analysis of Drivers and Restraints

Figure 4. South & Central America Precision Gearbox Market Volume (Thousand Units), 2021–2031

Figure 5. South & Central America Precision Gearbox Market Revenue (US\$ Million), 2021–2031

Figure 6. South & Central America Precision Gearbox Market Share (%) – by Product Type (2024 and 2031)

Figure 7. Planetary Gearboxes: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 8. Planetary Gearboxes: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 9. Right Angle: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 10. Right Angle: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 11. Parallel Shaft: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 12. Parallel Shaft: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 13. Others: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 14. Others: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 15. South & Central America Precision Gearbox Market Share (%) – by Application (2024 and 2031)

Figure 16. Military and Aerospace: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 17. Military and Aerospace: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 18. Food and Beverages: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 19. Food and Beverages: South & Central America Precision Gearbox Market –

Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 20. Machine Tools: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 21. Machine Tools: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 22. Material Handling: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 23. Material Handling: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 24. Packaging Machines: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 25. Packaging Machines: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 26. Robotics: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 27. Robotics: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 28. Medical Devices: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 29. Medical Devices: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 30. Others: South & Central America Precision Gearbox Market – Volume and Forecast, 2021 – 2031 (Thousand Units)

Figure 31. Others: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 32. South & Central America Precision Gearbox Market Breakdown, by Key Countries, 2024 and 2031 (%)

Figure 33. Brazil: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021– 2031 (US\$ Million)

Figure 34. Argentina: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021– 2031 (US\$ Million)

Figure 35. Rest of South & Central America: South & Central America Precision Gearbox Market – Revenue and Forecast, 2021– 2031 (US\$ Million)

Figure 36. Heat Map Analysis by Key Players

Figure 37. Company Positioning and Concentration

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