

Global Strain-Wave Gearing for Precision Motion Control Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Strain-Wave Gearing for Precision Motion Control competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, global Strain-Wave Gearing for Precision Motion Control production reached approximately 2.0 million units, with an average global market price of around US\$ 234 per unit. Strain-wave gearing is a type of precision motion control mechanism used in various applications, including robotics, aerospace, and industrial automation. It operates based on the principle of elastic deformation to achieve high gear reduction ratios with excellent precision and compact size. The main components of a strain-wave gear system include a circular spline, a flex spline, and a wave generator. The circular spline is a rigid ring with internal teeth, while the flex spline is a thin, flexible cup-shaped component with external teeth. The wave generator is a mechanism that applies a cyclical force to deform the flex spline, causing it to mesh with the teeth of the circular spline. As the wave generator rotates, it creates a "wave" of deformation in the flex spline, causing it to engage and disengage with the circular spline teeth. This interaction results in an elliptical motion of the flex spline relative to the circular spline, driving the output shaft with precise speed and torque control. From the perspective of market size and growth drivers, the industry has entered a period of rapid expansion. The core growth engine has evolved beyond traditional industrial robotics to encompass the transformative opportunity presented by humanoid robots. Companies like Tesla and Figure AI are accelerating the transition of humanoid robots from concept to pilot production. The significant quantity of harmonic reducers required per unit constitutes the primary expectation for the market's future explosive growth. Regarding the competitive landscape, the global market is led by the duo of

Japan's HDSI and China's Leaderdrive, which collectively hold over 63% of the global revenue market share. A notable trend, however, is the continual emergence of new domestic entrants in China. Driven by supportive policies and promising market prospects, significant capital and talent are flowing into this sector. While these new players are unlikely to challenge the top-tier incumbents in the short term, they are intensifying competition in the mid- to low-end market segments and possess the potential to reshape the future competitive dynamics through technological differentiation. From a product trend standpoint, technological iteration is accelerating markedly. To meet the stringent demands for high power density and low inertia in emerging applications such as humanoid robots, the adoption of lightweight materials has become a critical R&D focus. Concurrently, the development of mechatronic modules remains a dominant evolutionary path. Integrating components like torque sensors to enhance system performance and simplify downstream assembly is a key strategy for manufacturers to increase product value-added. A regional market analysis reveals diversified growth momentum. China remains the largest production and consumption market globally. However, growth hotspots in the coming years are expected to be widespread. Markets in Europe, the US, Japan, and South Korea are anticipated to see significantly accelerated growth rates, primarily fuelled by their leading positions in the research, development, and industrialization of frontier technologies such as humanoid robots and high-end medical equipment, which will spur rapid demand within local supply chains. A comprehensive future trend assessment indicates the industry is advancing into a new phase defined by technology-driven innovation and diverse demand. The parameters of competition have broadened from a primary focus on price and precision to a comprehensive contest involving service life reliability, lightweight design, cost control, and global service capabilities. Although the humanoid robot segment carries inherent uncertainties, the vast potential it represents has already catalysed substantial capital investment and technological innovation, providing a solid foundation for the industry's long-term prosperity. In summary, the harmonic reducer industry is at a critical juncture, marked by the convergence of traditional automation and advanced robotics. Chinese manufacturers, exemplified by Leaderdrive, have successfully ascended to the global top tier. The key to success in the next decade will hinge on a company's ability to sustain leadership in technologies like lightweight materials, while effectively capturing opportunities in evolving markets such as Europe, America, Japan, and South Korea.

The global Strain-Wave Gearing for Precision Motion Control market size was estimated at USD 467.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 24.90% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Strain-Wave Gearing for Precision Motion Control market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Strain-Wave Gearing for Precision Motion Control market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Strain-Wave Gearing for Precision Motion Control market.

Global Strain-Wave Gearing for Precision Motion Control Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

HDSI
Leaderdrive
ILJIN Motion & Control GmbH
Zhejiang Laifual
Shenzhen Han's Motion Technology
Nidec-Shimpo
OVALO GmbH
TC Drive
Beijing CTKM Harmonic Drive
Hiwin Corporation
Reach Machinery
Sichuan TLIBOT Co.,Ltd.
Ningbo Zhongda Leader Intelligent Transmission
Wanshsin Seikou
Main Drive
KHGEARS
Guangzhou Haozhi Industrial
Too Eph Transmission Technology
Guohua Intelligent Equipment
Schaeffler
BENRUN Robot
KOFON
GAM Enterprise
BHDI
SBB Tech
SPG
Jiangsu Guomao Reducer
Cone Drive
LI-MING Machinery Co., Ltd.

Market Segmentation (by Type)

Cup Style
Hat Style
Pancake Style

Market Segmentation (by Application)

Industry Robot

Semiconductor Equipment
Flat Panel Equipment
Machine Tools
Optical Machine
Printing, Bookbinding and Paper Machine
Metal Working Machine
Medical Equipment
Space Equipment
Automotive

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Strain-Wave Gearing for Precision Motion Control Market
Overview of the regional outlook of the Strain-Wave Gearing for Precision Motion Control Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Strain-Wave Gearing for Precision Motion Control Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Strain-Wave Gearing for Precision Motion Control, their output value, profit level, regional supply, production capacity

layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major

players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

- 1.1 Market Definition and Statistical Scope of Strain-Wave Gearing for Precision Motion Control
- 1.2 Key Market Segments
 - 1.2.1 Strain-Wave Gearing for Precision Motion Control Segment by Type
 - 1.2.2 Strain-Wave Gearing for Precision Motion Control Segment by Application
- 1.3 Methodology & Sources of Information
 - 1.3.1 Research Methodology
 - 1.3.2 Research Process
 - 1.3.3 Market Breakdown and Data Triangulation
 - 1.3.4 Base Year
 - 1.3.5 Report Assumptions & Caveats

2 STRAIN-WAVE GEARING FOR PRECISION MOTION CONTROL MARKET OVERVIEW

- 2.1 Global Market Overview
 - 2.1.1 Global Strain-Wave Gearing for Precision Motion Control Market Size (M USD) Estimates and Forecasts (2020-2035)
 - 2.1.2 Global Strain-Wave Gearing for Precision Motion Control Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

3 STRAIN-WAVE GEARING FOR PRECISION MOTION CONTROL MARKET COMPETITIVE LANDSCAPE

- 3.1 Company Assessment Quadrant
- 3.2 Global Strain-Wave Gearing for Precision Motion Control Product Life Cycle
- 3.3 Global Strain-Wave Gearing for Precision Motion Control Sales by Manufacturers (2020-2025)
- 3.4 Global Strain-Wave Gearing for Precision Motion Control Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Strain-Wave Gearing for Precision Motion Control Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Strain-Wave Gearing for Precision Motion Control Average Price by

Manufacturers (2020-2025)

3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types

3.8 Strain-Wave Gearing for Precision Motion Control Market Competitive Situation and Trends

3.8.1 Strain-Wave Gearing for Precision Motion Control Market Concentration Rate

3.8.2 Global 5 and 10 Largest Strain-Wave Gearing for Precision Motion Control

Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 STRAIN-WAVE GEARING FOR PRECISION MOTION CONTROL INDUSTRY CHAIN ANALYSIS

4.1 Strain-Wave Gearing for Precision Motion Control Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF STRAIN-WAVE GEARING FOR PRECISION MOTION CONTROL MARKET

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global Strain-Wave Gearing for Precision Motion Control Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to Strain-Wave Gearing for Precision Motion Control Market

5.7 ESG Ratings of Leading Companies

6 STRAIN-WAVE GEARING FOR PRECISION MOTION CONTROL MARKET SEGMENTATION BY TYPE

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Strain-Wave Gearing for Precision Motion Control Sales Market Share by Type (2020-2025)

6.3 Global Strain-Wave Gearing for Precision Motion Control Market Size by Type (2020-2025)

6.4 Global Strain-Wave Gearing for Precision Motion Control Price by Type (2020-2025)

7 STRAIN-WAVE GEARING FOR PRECISION MOTION CONTROL MARKET SEGMENTATION BY APPLICATION

7.1 Evaluation Matrix of Segment Market Development Potential (Application)

7.2 Global Strain-Wave Gearing for Precision Motion Control Market Sales by Application (2020-2025)

7.3 Global Strain-Wave Gearing for Precision Motion Control Market Size (M USD) by Application (2020-2025)

7.4 Global Strain-Wave Gearing for Precision Motion Control Sales Growth Rate by Application (2020-2025)

8 STRAIN-WAVE GEARING FOR PRECISION MOTION CONTROL MARKET SALES BY REGION

8.1 Global Strain-Wave Gearing for Precision Motion Control Sales by Region

8.1.1 Global Strain-Wave Gearing for Precision Motion Control Sales by Region

8.1.2 Global Strain-Wave Gearing for Precision Motion Control Sales Market Share by Region

8.2 Global Strain-Wave Gearing for Precision Motion Control Market Size by Region

8.2.1 Global Strain-Wave Gearing for Precision Motion Control Market Size by Region

8.2.2 Global Strain-Wave Gearing for Precision Motion Control Market Size by Region

8.3 North America

8.3.1 North America Strain-Wave Gearing for Precision Motion Control Sales by Country

8.3.2 North America Strain-Wave Gearing for Precision Motion Control Market Size by Country

8.3.3 U.S. Market Overview

8.3.4 Canada Market Overview

8.3.5 Mexico Market Overview

8.4 Europe

8.4.1 Europe Strain-Wave Gearing for Precision Motion Control Sales by Country

8.4.2 Europe Strain-Wave Gearing for Precision Motion Control Market Size by Country

8.4.3 Germany Market Overview

8.4.4 France Market Overview

8.4.5 U.K. Market Overview

8.4.6 Italy Market Overview

8.4.7 Spain Market Overview

8.5 Asia Pacific

8.5.1 Asia Pacific Strain-Wave Gearing for Precision Motion Control Sales by Region

8.5.2 Asia Pacific Strain-Wave Gearing for Precision Motion Control Market Size by Region

8.5.3 China Market Overview

8.5.4 Japan Market Overview

8.5.5 South Korea Market Overview

8.5.6 India Market Overview

8.5.7 Southeast Asia Market Overview

8.6 South America

8.6.1 South America Strain-Wave Gearing for Precision Motion Control Sales by Country

8.6.2 South America Strain-Wave Gearing for Precision Motion Control Market Size by Country

8.6.3 Brazil Market Overview

8.6.4 Argentina Market Overview

8.6.5 Columbia Market Overview

8.7 Middle East and Africa

8.7.1 Middle East and Africa Strain-Wave Gearing for Precision Motion Control Sales by Region

8.7.2 Middle East and Africa Strain-Wave Gearing for Precision Motion Control Market Size by Region

8.7.3 Saudi Arabia Market Overview

8.7.4 UAE Market Overview

8.7.5 Egypt Market Overview

8.7.6 Nigeria Market Overview

8.7.7 South Africa Market Overview

9 STRAIN-WAVE GEARING FOR PRECISION MOTION CONTROL MARKET PRODUCTION BY REGION

9.1 Global Production of Strain-Wave Gearing for Precision Motion Control by Region(2020-2025)

9.2 Global Strain-Wave Gearing for Precision Motion Control Revenue Market Share by Region (2020-2025)

9.3 Global Strain-Wave Gearing for Precision Motion Control Production, Revenue, Price and Gross Margin (2020-2025)

9.4 North America Strain-Wave Gearing for Precision Motion Control Production

9.4.1 North America Strain-Wave Gearing for Precision Motion Control Production Growth Rate (2020-2025)

9.4.2 North America Strain-Wave Gearing for Precision Motion Control Production, Revenue, Price and Gross Margin (2020-2025)

9.5 Europe Strain-Wave Gearing for Precision Motion Control Production

9.5.1 Europe Strain-Wave Gearing for Precision Motion Control Production Growth Rate (2020-2025)

9.5.2 Europe Strain-Wave Gearing for Precision Motion Control Production, Revenue, Price and Gross Margin (2020-2025)

9.6 Japan Strain-Wave Gearing for Precision Motion Control Production (2020-2025)

9.6.1 Japan Strain-Wave Gearing for Precision Motion Control Production Growth Rate (2020-2025)

9.6.2 Japan Strain-Wave Gearing for Precision Motion Control Production, Revenue, Price and Gross Margin (2020-2025)

9.7 China Strain-Wave Gearing for Precision Motion Control Production (2020-2025)

9.7.1 China Strain-Wave Gearing for Precision Motion Control Production Growth Rate (2020-2025)

9.7.2 China Strain-Wave Gearing for Precision Motion Control Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 HDSI

10.1.1 HDSI Basic Information

10.1.2 HDSI Strain-Wave Gearing for Precision Motion Control Product Overview

10.1.3 HDSI Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.1.4 HDSI Business Overview

10.1.5 HDSI SWOT Analysis

- 10.1.6 HDSI Recent Developments
- 10.2 Leaderdrive
 - 10.2.1 Leaderdrive Basic Information
 - 10.2.2 Leaderdrive Strain-Wave Gearing for Precision Motion Control Product Overview
 - 10.2.3 Leaderdrive Strain-Wave Gearing for Precision Motion Control Product Market Performance
 - 10.2.4 Leaderdrive Business Overview
 - 10.2.5 Leaderdrive SWOT Analysis
 - 10.2.6 Leaderdrive Recent Developments
- 10.3 ILJIN Motion and Control GmbH
 - 10.3.1 ILJIN Motion and Control GmbH Basic Information
 - 10.3.2 ILJIN Motion and Control GmbH Strain-Wave Gearing for Precision Motion Control Product Overview
 - 10.3.3 ILJIN Motion and Control GmbH Strain-Wave Gearing for Precision Motion Control Product Market Performance
 - 10.3.4 ILJIN Motion and Control GmbH Business Overview
 - 10.3.5 ILJIN Motion and Control GmbH SWOT Analysis
 - 10.3.6 ILJIN Motion and Control GmbH Recent Developments
- 10.4 Zhejiang Laifual
 - 10.4.1 Zhejiang Laifual Basic Information
 - 10.4.2 Zhejiang Laifual Strain-Wave Gearing for Precision Motion Control Product Overview
 - 10.4.3 Zhejiang Laifual Strain-Wave Gearing for Precision Motion Control Product Market Performance
 - 10.4.4 Zhejiang Laifual Business Overview
 - 10.4.5 Zhejiang Laifual Recent Developments
- 10.5 Shenzhen Han's Motion Technology
 - 10.5.1 Shenzhen Han's Motion Technology Basic Information
 - 10.5.2 Shenzhen Han's Motion Technology Strain-Wave Gearing for Precision Motion Control Product Overview
 - 10.5.3 Shenzhen Han's Motion Technology Strain-Wave Gearing for Precision Motion Control Product Market Performance
 - 10.5.4 Shenzhen Han's Motion Technology Business Overview
 - 10.5.5 Shenzhen Han's Motion Technology Recent Developments
- 10.6 Nidec-Shimpo
 - 10.6.1 Nidec-Shimpo Basic Information
 - 10.6.2 Nidec-Shimpo Strain-Wave Gearing for Precision Motion Control Product Overview

10.6.3 Nidec-Shimpo Strain-Wave Gearing for Precision Motion Control Product

Market Performance

10.6.4 Nidec-Shimpo Business Overview

10.6.5 Nidec-Shimpo Recent Developments

10.7 OVALO GmbH

10.7.1 OVALO GmbH Basic Information

10.7.2 OVALO GmbH Strain-Wave Gearing for Precision Motion Control Product Overview

10.7.3 OVALO GmbH Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.7.4 OVALO GmbH Business Overview

10.7.5 OVALO GmbH Recent Developments

10.8 TC Drive

10.8.1 TC Drive Basic Information

10.8.2 TC Drive Strain-Wave Gearing for Precision Motion Control Product Overview

10.8.3 TC Drive Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.8.4 TC Drive Business Overview

10.8.5 TC Drive Recent Developments

10.9 Beijing CTKM Harmonic Drive

10.9.1 Beijing CTKM Harmonic Drive Basic Information

10.9.2 Beijing CTKM Harmonic Drive Strain-Wave Gearing for Precision Motion Control Product Overview

10.9.3 Beijing CTKM Harmonic Drive Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.9.4 Beijing CTKM Harmonic Drive Business Overview

10.9.5 Beijing CTKM Harmonic Drive Recent Developments

10.10 Hiwin Corporation

10.10.1 Hiwin Corporation Basic Information

10.10.2 Hiwin Corporation Strain-Wave Gearing for Precision Motion Control Product Overview

10.10.3 Hiwin Corporation Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.10.4 Hiwin Corporation Business Overview

10.10.5 Hiwin Corporation Recent Developments

10.11 Reach Machinery

10.11.1 Reach Machinery Basic Information

10.11.2 Reach Machinery Strain-Wave Gearing for Precision Motion Control Product Overview

10.11.3 Reach Machinery Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.11.4 Reach Machinery Business Overview

10.11.5 Reach Machinery Recent Developments

10.12 Sichuan TLIBOT Co.,Ltd.

10.12.1 Sichuan TLIBOT Co.,Ltd. Basic Information

10.12.2 Sichuan TLIBOT Co.,Ltd. Strain-Wave Gearing for Precision Motion Control Product Overview

10.12.3 Sichuan TLIBOT Co.,Ltd. Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.12.4 Sichuan TLIBOT Co.,Ltd. Business Overview

10.12.5 Sichuan TLIBOT Co.,Ltd. Recent Developments

10.13 Ningbo Zhongda Leader Intelligent Transmission

10.13.1 Ningbo Zhongda Leader Intelligent Transmission Basic Information

10.13.2 Ningbo Zhongda Leader Intelligent Transmission Strain-Wave Gearing for Precision Motion Control Product Overview

10.13.3 Ningbo Zhongda Leader Intelligent Transmission Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.13.4 Ningbo Zhongda Leader Intelligent Transmission Business Overview

10.13.5 Ningbo Zhongda Leader Intelligent Transmission Recent Developments

10.14 Wanshsin Seikou

10.14.1 Wanshsin Seikou Basic Information

10.14.2 Wanshsin Seikou Strain-Wave Gearing for Precision Motion Control Product Overview

10.14.3 Wanshsin Seikou Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.14.4 Wanshsin Seikou Business Overview

10.14.5 Wanshsin Seikou Recent Developments

10.15 Main Drive

10.15.1 Main Drive Basic Information

10.15.2 Main Drive Strain-Wave Gearing for Precision Motion Control Product Overview

10.15.3 Main Drive Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.15.4 Main Drive Business Overview

10.15.5 Main Drive Recent Developments

10.16 KHGEARS

10.16.1 KHGEARS Basic Information

10.16.2 KHGEARS Strain-Wave Gearing for Precision Motion Control Product

Overview

10.16.3 KHGEARS Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.16.4 KHGEARS Business Overview

10.16.5 KHGEARS Recent Developments

10.17 Guangzhou Haozhi Industrial

10.17.1 Guangzhou Haozhi Industrial Basic Information

10.17.2 Guangzhou Haozhi Industrial Strain-Wave Gearing for Precision Motion Control Product Overview

10.17.3 Guangzhou Haozhi Industrial Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.17.4 Guangzhou Haozhi Industrial Business Overview

10.17.5 Guangzhou Haozhi Industrial Recent Developments

10.18 Too Eph Transmission Technology

10.18.1 Too Eph Transmission Technology Basic Information

10.18.2 Too Eph Transmission Technology Strain-Wave Gearing for Precision Motion Control Product Overview

10.18.3 Too Eph Transmission Technology Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.18.4 Too Eph Transmission Technology Business Overview

10.18.5 Too Eph Transmission Technology Recent Developments

10.19 Guohua Intelligent Equipment

10.19.1 Guohua Intelligent Equipment Basic Information

10.19.2 Guohua Intelligent Equipment Strain-Wave Gearing for Precision Motion Control Product Overview

10.19.3 Guohua Intelligent Equipment Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.19.4 Guohua Intelligent Equipment Business Overview

10.19.5 Guohua Intelligent Equipment Recent Developments

10.20 Schaeffler

10.20.1 Schaeffler Basic Information

10.20.2 Schaeffler Strain-Wave Gearing for Precision Motion Control Product Overview

10.20.3 Schaeffler Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.20.4 Schaeffler Business Overview

10.20.5 Schaeffler Recent Developments

10.21 BENRUN Robot

10.21.1 BENRUN Robot Basic Information

10.21.2 BENRUN Robot Strain-Wave Gearing for Precision Motion Control Product Overview

10.21.3 BENRUN Robot Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.21.4 BENRUN Robot Business Overview

10.21.5 BENRUN Robot Recent Developments

10.22 KOFON

10.22.1 KOFON Basic Information

10.22.2 KOFON Strain-Wave Gearing for Precision Motion Control Product Overview

10.22.3 KOFON Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.22.4 KOFON Business Overview

10.22.5 KOFON Recent Developments

10.23 GAM Enterprise

10.23.1 GAM Enterprise Basic Information

10.23.2 GAM Enterprise Strain-Wave Gearing for Precision Motion Control Product Overview

10.23.3 GAM Enterprise Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.23.4 GAM Enterprise Business Overview

10.23.5 GAM Enterprise Recent Developments

10.24 BHDl

10.24.1 BHDl Basic Information

10.24.2 BHDl Strain-Wave Gearing for Precision Motion Control Product Overview

10.24.3 BHDl Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.24.4 BHDl Business Overview

10.24.5 BHDl Recent Developments

10.25 SBB Tech

10.25.1 SBB Tech Basic Information

10.25.2 SBB Tech Strain-Wave Gearing for Precision Motion Control Product Overview

10.25.3 SBB Tech Strain-Wave Gearing for Precision Motion Control Product Market Performance

10.25.4 SBB Tech Business Overview

10.25.5 SBB Tech Recent Developments

10.26 SPG

10.26.1 SPG Basic Information

10.26.2 SPG Strain-Wave Gearing for Precision Motion Control Product Overview

- 10.26.3 SPG Strain-Wave Gearing for Precision Motion Control Product Market Performance
 - 10.26.4 SPG Business Overview
 - 10.26.5 SPG Recent Developments
- 10.27 Jiangsu Guomao Reducer
 - 10.27.1 Jiangsu Guomao Reducer Basic Information
 - 10.27.2 Jiangsu Guomao Reducer Strain-Wave Gearing for Precision Motion Control Product Overview
 - 10.27.3 Jiangsu Guomao Reducer Strain-Wave Gearing for Precision Motion Control Product Market Performance
 - 10.27.4 Jiangsu Guomao Reducer Business Overview
 - 10.27.5 Jiangsu Guomao Reducer Recent Developments
- 10.28 Cone Drive
 - 10.28.1 Cone Drive Basic Information
 - 10.28.2 Cone Drive Strain-Wave Gearing for Precision Motion Control Product Overview
 - 10.28.3 Cone Drive Strain-Wave Gearing for Precision Motion Control Product Market Performance
 - 10.28.4 Cone Drive Business Overview
 - 10.28.5 Cone Drive Recent Developments
- 10.29 LI-MING Machinery Co., Ltd.
 - 10.29.1 LI-MING Machinery Co., Ltd. Basic Information
 - 10.29.2 LI-MING Machinery Co., Ltd. Strain-Wave Gearing for Precision Motion Control Product Overview
 - 10.29.3 LI-MING Machinery Co., Ltd. Strain-Wave Gearing for Precision Motion Control Product Market Performance
 - 10.29.4 LI-MING Machinery Co., Ltd. Business Overview
 - 10.29.5 LI-MING Machinery Co., Ltd. Recent Developments

11 STRAIN-WAVE GEARING FOR PRECISION MOTION CONTROL MARKET FORECAST BY REGION

- 11.1 Global Strain-Wave Gearing for Precision Motion Control Market Size Forecast
- 11.2 Global Strain-Wave Gearing for Precision Motion Control Market Forecast by Region
 - 11.2.1 North America Market Size Forecast by Country
 - 11.2.2 Europe Strain-Wave Gearing for Precision Motion Control Market Size Forecast by Country
 - 11.2.3 Asia Pacific Strain-Wave Gearing for Precision Motion Control Market Size

Forecast by Region

11.2.4 South America Strain-Wave Gearing for Precision Motion Control Market Size

Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of Strain-Wave Gearing for Precision Motion Control by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

12.1 Global Strain-Wave Gearing for Precision Motion Control Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of Strain-Wave Gearing for Precision Motion Control by Type (2026-2035)

12.1.2 Global Strain-Wave Gearing for Precision Motion Control Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of Strain-Wave Gearing for Precision Motion Control by Type (2026-2035)

12.2 Global Strain-Wave Gearing for Precision Motion Control Market Forecast by Application (2026-2035)

12.2.1 Global Strain-Wave Gearing for Precision Motion Control Sales (K Units) Forecast by Application

12.2.2 Global Strain-Wave Gearing for Precision Motion Control Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Strain-Wave Gearing for Precision Motion Control Market Size by Type (M USD)

Table 4. Global Strain-Wave Gearing for Precision Motion Control Market Size by Application

Table 5. Strain-Wave Gearing for Precision Motion Control Market Size Comparison by Region (M USD)

Table 6. Global Strain-Wave Gearing for Precision Motion Control Sales (K Units) by Manufacturers (2020-2025)

Table 7. Global Strain-Wave Gearing for Precision Motion Control Sales Market Share by Manufacturers (2020-2025)

Table 8. Global Strain-Wave Gearing for Precision Motion Control Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global Strain-Wave Gearing for Precision Motion Control Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Strain-Wave Gearing for Precision Motion Control as of 2025)

Table 11. Global Market Strain-Wave Gearing for Precision Motion Control Average Price (USD/Unit) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Strain-Wave Gearing for Precision Motion Control Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. Strain-Wave Gearing for Precision Motion Control Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading

Countries

Table 26. Global Strain-Wave Gearing for Precision Motion Control Sales by Type (K Units)

Table 27. Global Strain-Wave Gearing for Precision Motion Control Market Size by Type (M USD)

Table 28. Global Strain-Wave Gearing for Precision Motion Control Sales (K Units) by Type (2020-2025)

Table 29. Global Strain-Wave Gearing for Precision Motion Control Sales Market Share by Type (2020-2025)

Table 30. Global Strain-Wave Gearing for Precision Motion Control Market Size (M USD) by Type (2020-2025)

Table 31. Global Strain-Wave Gearing for Precision Motion Control Market Share by Type (2020-2025)

Table 32. Global Strain-Wave Gearing for Precision Motion Control Price (USD/Unit) by Type (2020-2025)

Table 33. Global Strain-Wave Gearing for Precision Motion Control Sales (K Units) by Application

Table 34. Global Strain-Wave Gearing for Precision Motion Control Market Size by Application

Table 35. Global Strain-Wave Gearing for Precision Motion Control Sales by Application (2020-2025) & (K Units)

Table 36. Global Strain-Wave Gearing for Precision Motion Control Sales Market Share by Application (2020-2025)

Table 37. Global Strain-Wave Gearing for Precision Motion Control Market Size by Application (2020-2025) & (M USD)

Table 38. Global Strain-Wave Gearing for Precision Motion Control Market Share by Application (2020-2025)

Table 39. Global Strain-Wave Gearing for Precision Motion Control Sales Growth Rate by Application (2020-2025)

Table 40. Global Strain-Wave Gearing for Precision Motion Control Sales by Region (2020-2025) & (K Units)

Table 41. Global Strain-Wave Gearing for Precision Motion Control Sales Market Share by Region (2020-2025)

Table 42. Global Strain-Wave Gearing for Precision Motion Control Market Size by Region (2020-2025) & (M USD)

Table 43. Global Strain-Wave Gearing for Precision Motion Control Market Size by Region (2020-2025)

Table 44. North America Strain-Wave Gearing for Precision Motion Control Sales by Country (2020-2025) & (K Units)

Table 45. North America Strain-Wave Gearing for Precision Motion Control Market Size by Country (2020-2025) & (M USD)

Table 46. Europe Strain-Wave Gearing for Precision Motion Control Sales by Country (2020-2025) & (K Units)

Table 47. Europe Strain-Wave Gearing for Precision Motion Control Market Size by Country (2020-2025) & (M USD)

Table 48. Asia Pacific Strain-Wave Gearing for Precision Motion Control Sales by Region (2020-2025) & (K Units)

Table 49. Asia Pacific Strain-Wave Gearing for Precision Motion Control Market Size by Region (2020-2025) & (M USD)

Table 50. South America Strain-Wave Gearing for Precision Motion Control Sales by Country (2020-2025) & (K Units)

Table 51. South America Strain-Wave Gearing for Precision Motion Control Market Size by Country (2020-2025) & (M USD)

Table 52. Middle East and Africa Strain-Wave Gearing for Precision Motion Control Sales by Region (2020-2025) & (K Units)

Table 53. Middle East and Africa Strain-Wave Gearing for Precision Motion Control Market Size by Region (2020-2025) & (M USD)

Table 54. Global Strain-Wave Gearing for Precision Motion Control Production (K Units) by Region(2020-2025)

Table 55. Global Strain-Wave Gearing for Precision Motion Control Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global Strain-Wave Gearing for Precision Motion Control Revenue Market Share by Region (2020-2025)

Table 57. Global Strain-Wave Gearing for Precision Motion Control Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 58. North America Strain-Wave Gearing for Precision Motion Control Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 59. Europe Strain-Wave Gearing for Precision Motion Control Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 60. Japan Strain-Wave Gearing for Precision Motion Control Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 61. China Strain-Wave Gearing for Precision Motion Control Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 62. HDSI Basic Information

Table 63. HDSI Strain-Wave Gearing for Precision Motion Control Product Overview

Table 64. HDSI Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 65. HDSI Business Overview

Table 66. HDSI SWOT Analysis

Table 67. HDSI Recent Developments

Table 68. Leaderdrive Basic Information

Table 69. Leaderdrive Strain-Wave Gearing for Precision Motion Control Product Overview

Table 70. Leaderdrive Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 71. Leaderdrive Business Overview

Table 72. Leaderdrive SWOT Analysis

Table 73. Leaderdrive Recent Developments

Table 74. ILJIN Motion and Control GmbH Basic Information

Table 75. ILJIN Motion and Control GmbH Strain-Wave Gearing for Precision Motion Control Product Overview

Table 76. ILJIN Motion and Control GmbH Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 77. ILJIN Motion and Control GmbH Business Overview

Table 78. ILJIN Motion and Control GmbH SWOT Analysis

Table 79. ILJIN Motion and Control GmbH Recent Developments

Table 80. Zhejiang Laifual Basic Information

Table 81. Zhejiang Laifual Strain-Wave Gearing for Precision Motion Control Product Overview

Table 82. Zhejiang Laifual Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 83. Zhejiang Laifual Business Overview

Table 84. Zhejiang Laifual Recent Developments

Table 85. Shenzhen Han's Motion Technology Basic Information

Table 86. Shenzhen Han's Motion Technology Strain-Wave Gearing for Precision Motion Control Product Overview

Table 87. Shenzhen Han's Motion Technology Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 88. Shenzhen Han's Motion Technology Business Overview

Table 89. Shenzhen Han's Motion Technology Recent Developments

Table 90. Nidec-Shimpo Basic Information

Table 91. Nidec-Shimpo Strain-Wave Gearing for Precision Motion Control Product Overview

Table 92. Nidec-Shimpo Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

- Table 93. Nidec-Shimpo Business Overview
- Table 94. Nidec-Shimpo Recent Developments
- Table 95. OVALO GmbH Basic Information
- Table 96. OVALO GmbH Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 97. OVALO GmbH Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 98. OVALO GmbH Business Overview
- Table 99. OVALO GmbH Recent Developments
- Table 100. TC Drive Basic Information
- Table 101. TC Drive Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 102. TC Drive Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 103. TC Drive Business Overview
- Table 104. TC Drive Recent Developments
- Table 105. Beijing CTKM Harmonic Drive Basic Information
- Table 106. Beijing CTKM Harmonic Drive Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 107. Beijing CTKM Harmonic Drive Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 108. Beijing CTKM Harmonic Drive Business Overview
- Table 109. Beijing CTKM Harmonic Drive Recent Developments
- Table 110. Hiwin Corporation Basic Information
- Table 111. Hiwin Corporation Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 112. Hiwin Corporation Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 113. Hiwin Corporation Business Overview
- Table 114. Hiwin Corporation Recent Developments
- Table 115. Reach Machinery Basic Information
- Table 116. Reach Machinery Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 117. Reach Machinery Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 118. Reach Machinery Business Overview
- Table 119. Reach Machinery Recent Developments
- Table 120. Sichuan TLIBOT Co.,Ltd. Basic Information

- Table 121. Sichuan TLIBOT Co.,Ltd. Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 122. Sichuan TLIBOT Co.,Ltd. Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 123. Sichuan TLIBOT Co.,Ltd. Business Overview
- Table 124. Sichuan TLIBOT Co.,Ltd. Recent Developments
- Table 125. Ningbo Zhongda Leader Intelligent Transmission Basic Information
- Table 126. Ningbo Zhongda Leader Intelligent Transmission Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 127. Ningbo Zhongda Leader Intelligent Transmission Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 128. Ningbo Zhongda Leader Intelligent Transmission Business Overview
- Table 129. Ningbo Zhongda Leader Intelligent Transmission Recent Developments
- Table 130. Wanshsin Seikou Basic Information
- Table 131. Wanshsin Seikou Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 132. Wanshsin Seikou Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 133. Wanshsin Seikou Business Overview
- Table 134. Wanshsin Seikou Recent Developments
- Table 135. Main Drive Basic Information
- Table 136. Main Drive Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 137. Main Drive Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 138. Main Drive Business Overview
- Table 139. Main Drive Recent Developments
- Table 140. KHGEARS Basic Information
- Table 141. KHGEARS Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 142. KHGEARS Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 143. KHGEARS Business Overview
- Table 144. KHGEARS Recent Developments
- Table 145. Guangzhou Haozhi Industrial Basic Information
- Table 146. Guangzhou Haozhi Industrial Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 147. Guangzhou Haozhi Industrial Strain-Wave Gearing for Precision Motion

Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 148. Guangzhou Haozhi Industrial Business Overview

Table 149. Guangzhou Haozhi Industrial Recent Developments

Table 150. Too Eph Transmission Technology Basic Information

Table 151. Too Eph Transmission Technology Strain-Wave Gearing for Precision Motion Control Product Overview

Table 152. Too Eph Transmission Technology Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 153. Too Eph Transmission Technology Business Overview

Table 154. Too Eph Transmission Technology Recent Developments

Table 155. Guohua Intelligent Equipment Basic Information

Table 156. Guohua Intelligent Equipment Strain-Wave Gearing for Precision Motion Control Product Overview

Table 157. Guohua Intelligent Equipment Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 158. Guohua Intelligent Equipment Business Overview

Table 159. Guohua Intelligent Equipment Recent Developments

Table 160. Schaeffler Basic Information

Table 161. Schaeffler Strain-Wave Gearing for Precision Motion Control Product Overview

Table 162. Schaeffler Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 163. Schaeffler Business Overview

Table 164. Schaeffler Recent Developments

Table 165. BENRUN Robot Basic Information

Table 166. BENRUN Robot Strain-Wave Gearing for Precision Motion Control Product Overview

Table 167. BENRUN Robot Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 168. BENRUN Robot Business Overview

Table 169. BENRUN Robot Recent Developments

Table 170. KOFON Basic Information

Table 171. KOFON Strain-Wave Gearing for Precision Motion Control Product Overview

Table 172. KOFON Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 173. KOFON Business Overview

- Table 174. KOFON Recent Developments
- Table 175. GAM Enterprise Basic Information
- Table 176. GAM Enterprise Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 177. GAM Enterprise Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 178. GAM Enterprise Business Overview
- Table 179. GAM Enterprise Recent Developments
- Table 180. BHDI Basic Information
- Table 181. BHDI Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 182. BHDI Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 183. BHDI Business Overview
- Table 184. BHDI Recent Developments
- Table 185. SBB Tech Basic Information
- Table 186. SBB Tech Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 187. SBB Tech Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 188. SBB Tech Business Overview
- Table 189. SBB Tech Recent Developments
- Table 190. SPG Basic Information
- Table 191. SPG Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 192. SPG Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 193. SPG Business Overview
- Table 194. SPG Recent Developments
- Table 195. Jiangsu Guomao Reducer Basic Information
- Table 196. Jiangsu Guomao Reducer Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 197. Jiangsu Guomao Reducer Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 198. Jiangsu Guomao Reducer Business Overview
- Table 199. Jiangsu Guomao Reducer Recent Developments
- Table 200. Cone Drive Basic Information
- Table 201. Cone Drive Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 202. Cone Drive Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

- Table 203. Cone Drive Business Overview
- Table 204. Cone Drive Recent Developments
- Table 205. LI-MING Machinery Co., Ltd. Basic Information
- Table 206. LI-MING Machinery Co., Ltd. Strain-Wave Gearing for Precision Motion Control Product Overview
- Table 207. LI-MING Machinery Co., Ltd. Strain-Wave Gearing for Precision Motion Control Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 208. LI-MING Machinery Co., Ltd. Business Overview
- Table 209. LI-MING Machinery Co., Ltd. Recent Developments
- Table 210. Global Strain-Wave Gearing for Precision Motion Control Sales Forecast by Region (2026-2035) & (K Units)
- Table 211. Global Strain-Wave Gearing for Precision Motion Control Market Size Forecast by Region (2026-2035) & (M USD)
- Table 212. North America Strain-Wave Gearing for Precision Motion Control Sales Forecast by Country (2026-2035) & (K Units)
- Table 213. North America Strain-Wave Gearing for Precision Motion Control Market Size Forecast by Country (2026-2035) & (M USD)
- Table 214. Europe Strain-Wave Gearing for Precision Motion Control Sales Forecast by Country (2026-2035) & (K Units)
- Table 215. Europe Strain-Wave Gearing for Precision Motion Control Market Size Forecast by Country (2026-2035) & (M USD)
- Table 216. Asia Pacific Strain-Wave Gearing for Precision Motion Control Sales Forecast by Region (2026-2035) & (K Units)
- Table 217. Asia Pacific Strain-Wave Gearing for Precision Motion Control Market Size Forecast by Region (2026-2035) & (M USD)
- Table 218. South America Strain-Wave Gearing for Precision Motion Control Sales Forecast by Country (2026-2035) & (K Units)
- Table 219. South America Strain-Wave Gearing for Precision Motion Control Market Size Forecast by Country (2026-2035) & (M USD)
- Table 220. Middle East and Africa Strain-Wave Gearing for Precision Motion Control Sales Forecast by Country (2026-2035) & (Units)
- Table 221. Middle East and Africa Strain-Wave Gearing for Precision Motion Control Market Size Forecast by Country (2026-2035) & (M USD)
- Table 222. Global Strain-Wave Gearing for Precision Motion Control Sales Forecast by Type (2026-2035) & (K Units)
- Table 223. Global Strain-Wave Gearing for Precision Motion Control Market Size Forecast by Type (2026-2035) & (M USD)
- Table 224. Global Strain-Wave Gearing for Precision Motion Control Price Forecast by

Type (2026-2035) & (USD/Unit)

Table 225. Global Strain-Wave Gearing for Precision Motion Control Sales (K Units)

Forecast by Application (2026-2035)

Table 226. Global Strain-Wave Gearing for Precision Motion Control Market Size

Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Strain-Wave Gearing for Precision Motion Control
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Strain-Wave Gearing for Precision Motion Control Market Size (M USD), 2025-2035
- Figure 5. Global Strain-Wave Gearing for Precision Motion Control Market Size (M USD) (2020-2035)
- Figure 6. Global Strain-Wave Gearing for Precision Motion Control Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Strain-Wave Gearing for Precision Motion Control Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Strain-Wave Gearing for Precision Motion Control Product Life Cycle
- Figure 13. Strain-Wave Gearing for Precision Motion Control Sales Share by Manufacturers in 2025
- Figure 14. Global Strain-Wave Gearing for Precision Motion Control Revenue Share by Manufacturers in 2025
- Figure 15. Strain-Wave Gearing for Precision Motion Control Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Strain-Wave Gearing for Precision Motion Control Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Strain-Wave Gearing for Precision Motion Control Revenue in 2025
- Figure 18. Industry Chain Map of Strain-Wave Gearing for Precision Motion Control
- Figure 19. Global Strain-Wave Gearing for Precision Motion Control Market PEST Analysis
- Figure 20. Global Strain-Wave Gearing for Precision Motion Control Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers

Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)

Figure 26. Global Strain-Wave Gearing for Precision Motion Control Market Share by Type

Figure 27. Sales Market Share of Strain-Wave Gearing for Precision Motion Control by Type (2020-2025)

Figure 28. Sales Market Share of Strain-Wave Gearing for Precision Motion Control by Type in 2025

Figure 29. Market Share of Strain-Wave Gearing for Precision Motion Control by Type (2020-2025)

Figure 30. Market Share of Strain-Wave Gearing for Precision Motion Control by Type in 2025

Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

Figure 32. Global Strain-Wave Gearing for Precision Motion Control Market Share by Application

Figure 33. Global Strain-Wave Gearing for Precision Motion Control Sales Market Share by Application (2020-2025)

Figure 34. Global Strain-Wave Gearing for Precision Motion Control Sales Market Share by Application in 2025

Figure 35. Global Strain-Wave Gearing for Precision Motion Control Market Share by Application (2020-2025)

Figure 36. Global Strain-Wave Gearing for Precision Motion Control Market Share by Application in 2025

Figure 37. Global Strain-Wave Gearing for Precision Motion Control Sales Growth Rate by Application (2020-2025)

Figure 38. Global Strain-Wave Gearing for Precision Motion Control Sales Market Share by Region (2020-2025)

Figure 39. Global Strain-Wave Gearing for Precision Motion Control Market Size by Region (2020-2025)

Figure 40. North America Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 41. North America Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 42. North America Strain-Wave Gearing for Precision Motion Control Sales Market Share by Country in 2024

Figure 43. North America Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 44. North America Strain-Wave Gearing for Precision Motion Control Market Size by Country in 2024

Figure 45. U.S. Strain-Wave Gearing for Precision Motion Control Sales and Growth

Rate (2020-2025) & (K Units)

Figure 46. U.S. Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 47. Canada Strain-Wave Gearing for Precision Motion Control Sales (K Units) and Growth Rate (2020-2025)

Figure 48. Canada Strain-Wave Gearing for Precision Motion Control Market Size (M USD) and Growth Rate (2020-2025)

Figure 49. Mexico Strain-Wave Gearing for Precision Motion Control Sales (Units) and Growth Rate (2020-2025)

Figure 50. Mexico Strain-Wave Gearing for Precision Motion Control Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 52. Europe Strain-Wave Gearing for Precision Motion Control Sales Market Share by Country in 2024

Figure 53. Europe Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Strain-Wave Gearing for Precision Motion Control Market Size by Country in 2024

Figure 55. Germany Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Strain-Wave Gearing for Precision Motion Control Sales Market Share by Region in 2024

Figure 67. Asia Pacific Strain-Wave Gearing for Precision Motion Control Market Size by Region in 2024

Figure 68. China Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (K Units)

Figure 79. South America Strain-Wave Gearing for Precision Motion Control Sales Market Share by Country in 2024

Figure 80. South America Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (M USD)

Figure 81. South America Strain-Wave Gearing for Precision Motion Control Market Size by Country in 2024

Figure 82. Brazil Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Strain-Wave Gearing for Precision Motion Control Sales and

Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 87. Columbia Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa Strain-Wave Gearing for Precision Motion Control Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Strain-Wave Gearing for Precision Motion Control Market Size by Region in 2024

Figure 92. Saudi Arabia Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 93. Saudi Arabia Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Strain-Wave Gearing for Precision Motion Control Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa Strain-Wave Gearing for Precision Motion Control Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Strain-Wave Gearing for Precision Motion Control Production Market Share by Region (2020-2025)

Figure 103. North America Strain-Wave Gearing for Precision Motion Control Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe Strain-Wave Gearing for Precision Motion Control Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan Strain-Wave Gearing for Precision Motion Control Production (K Units) Growth Rate (2020-2025)

Figure 106. China Strain-Wave Gearing for Precision Motion Control Production (K Units) Growth Rate (2020-2025)

Figure 107. Global Strain-Wave Gearing for Precision Motion Control Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global Strain-Wave Gearing for Precision Motion Control Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Strain-Wave Gearing for Precision Motion Control Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Strain-Wave Gearing for Precision Motion Control Market Share Forecast by Type (2026-2035)

Figure 111. Global Strain-Wave Gearing for Precision Motion Control Sales Forecast by Application (2026-2035)

Figure 112. Global Strain-Wave Gearing for Precision Motion Control Market Share Forecast by Application (2026-2035)

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