

Global Cup Style Harmonic Drive Gear Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cup Style Harmonic Drive Gear market size is expected to reach \$ 1355 million by 2032, rising at a market growth of 28.4% CAGR during the forecast period (2026-2032).

A Cup Style Harmonic Drive Gear is a high-precision harmonic transmission device featuring a cup-shaped flexspline structure. It is mainly composed of a wave generator, cup-shaped flexspline, circular spline, cross-roller bearing, and supporting components. Its working principle is based on the periodic elastic deformation of the cup-shaped flexspline driven by the wave generator, which creates differential tooth engagement with the circular spline and enables high reduction ratio, high transmission accuracy, low backlash, and high torque density output. Compared with hat style and pancake style structures, the cup style design features mature technology, broad applicability, stable transmission performance, and a compact structure. It is widely used in industrial robots, humanoid robots, semiconductor equipment, automation systems, medical devices, and precision motion control systems. In 2025, global cup style harmonic drive gear output reached 1.22 million units, with an average selling price of USD 208 per unit.

Cup style harmonic drive gears are one of the most mature and widely used structural types in the harmonic reducer market, mainly serving high-precision transmission applications in robotics, semiconductor equipment, automation systems, and precision motion control. By using the elastic deformation of a cup-shaped flexspline, these products provide precision speed reduction with low backlash, high reduction ratio, high torque density, and compact installation space. They are especially suitable for joints and actuators that require limited space, high accuracy, and stable motion performance. As industrial robots upgrade toward higher cycle speed, higher precision, and greater

reliability, and as humanoid robots require lighter, smaller, and more responsive joint modules, the application scope of cup style harmonic drive gears continues to expand.

In terms of product structure, cup style harmonic drive gears can be further classified by outer diameter, rated torque, reduction ratio, output configuration, and mounting design. Medium and small sizes represent the mainstream demand in robotics and automation equipment. Lower reduction ratio products are more suitable for high-speed response and light-load joints, while medium and high reduction ratio products are mainly used in joints and actuators requiring higher output torque and positioning accuracy. Future product upgrades will focus on stronger flexspline materials, optimized tooth profile modification, bearing integration, longer lubrication life, noise reduction, and lightweight design.

From the application perspective, industrial robots remain an important downstream market for cup style harmonic drive gears, especially in wrists, forearms, end-effectors, and light- to medium-load joints. Humanoid robots are becoming an important source of incremental demand, with applications in arms, legs, waist joints, dexterous hands, and lightweight joint modules. Beyond robotics, these products are also widely used in semiconductor equipment, photovoltaic equipment, medical imaging devices, precision rotary stages, inspection systems, and automation tooling. These downstream applications generally require high repeat positioning accuracy, stable operation, lifetime consistency, and low maintenance, making customer qualification and long-term operating validation key entry barriers.

From the supply chain and manufacturing perspective, upstream inputs include high-strength alloy steel, bearing steel, flexspline materials, cross-roller bearings, lubricants, heat treatment services, precision machining equipment, gear grinding equipment, and inspection systems. Midstream production includes flexspline deep drawing or spinning, tooth profile machining, heat treatment, precision grinding, assembly, running-in tests, and accuracy inspection. Downstream customers include robot manufacturers, joint module suppliers, automation equipment companies, and precision equipment manufacturers. The cost structure is mainly driven by materials, bearings, heat treatment, precision tooth processing, inspection, yield loss, and R&D validation. A mature automated production line typically has annual single-line capacity of 100,000 to 300,000 units, with higher capacity achievable when product specifications are concentrated and automation level is high.

In terms of profitability and competitive landscape, cup style harmonic drive gears are

high-precision mechanical transmission components, with industry gross margins generally ranging from 25% to 40%. Leading suppliers hold strong advantages in the high-end market due to long-term lifetime validation, stable mass manufacturing capability, customer qualification experience, and higher-end product portfolios. Local replacement suppliers are accelerating market entry through cost control, capacity expansion, and co-development with customers. Future competition will shift from pure price competition toward comprehensive capabilities in low-backlash retention, lifetime consistency, low noise, lightweight design, high torque density, and modular integration. Suppliers with strong capabilities in materials, heat treatment, tooth profile machining, assembly inspection, and customer joint validation are expected to gain stronger market positions.

This report studies the global Cup Style Harmonic Drive Gear production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cup Style Harmonic Drive Gear and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Cup Style Harmonic Drive Gear that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Cup Style Harmonic Drive Gear total production and demand, 2021-2032, (K Units)

Global Cup Style Harmonic Drive Gear total production value, 2021-2032, (USD Million)

Global Cup Style Harmonic Drive Gear production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Cup Style Harmonic Drive Gear consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Cup Style Harmonic Drive Gear domestic production, consumption, key domestic manufacturers and share

Global Cup Style Harmonic Drive Gear production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Cup Style Harmonic Drive Gear production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Cup Style Harmonic Drive Gear production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Cup Style Harmonic Drive Gear market

based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include 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, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Cup Style Harmonic Drive Gear market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Cup Style Harmonic Drive Gear Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Cup Style Harmonic Drive Gear Market, Segmentation by Type:

Reduction Ratio $\geq 50:1$

Reduction Ratio: 50:1 to 100:1

Reduction Ratio $\geq 100:1$

Global Cup Style Harmonic Drive Gear Market, Segmentation by Accuracy:

≥ 0.5 arcmin

0.5 ≥ 1 arcmin

1 ≥ 3 arcmin

Others

Global Cup Style Harmonic Drive Gear Market, Segmentation by Sales Channel:

Direct Sales

Distribution

Global Cup Style Harmonic Drive Gear Market, Segmentation by Application:

Industrial Robots

Semiconductor Equipment

Flat Panel Equipment

Machine Tools

Optical Machine

Printing, Bookbinding and Paper Machine

Metal Working Machine

Medical Equipment

Space Equipment

Automotive

Defense Industry

Humanoid Robots

Others

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global Cup Style Harmonic Drive Gear market?
2. What is the demand of the global Cup Style Harmonic Drive Gear market?
3. What is the year over year growth of the global Cup Style Harmonic Drive Gear market?
4. What is the production and production value of the global Cup Style Harmonic Drive Gear market?
5. Who are the key producers in the global Cup Style Harmonic Drive Gear market?
6. What are the growth factors driving the market demand?

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