

Global Flexspline for Harmonic Drive Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Flexspline for Harmonic Drive market size was valued at US\$ 111 million in 2025 and is forecast to a readjusted size of US\$ 253 million by 2032 with a CAGR of 12.2% during review period.

Flexspline for harmonic drive is the core elastic thin wall external gear component used in harmonic transmission systems for high precision reduction and motion control applications in industrial robots, humanoid robots, collaborative robots, semiconductor equipment, medical systems and advanced automation machinery. The research scope mainly covers cup type, hat type and flanged flexspline products manufactured with high strength alloy steel, stainless steel and specialized heat treated metallic materials. Core manufacturing technologies include ultra thin wall precision forming, gear profile machining, heat treatment, fatigue life optimization and high consistency precision assembly. Key specifications generally include module, tooth count, torque class, radial deformation capability, concentricity and cyclic fatigue life. The primary function of the product is to achieve periodic meshing with the circular spline through controlled elastic deformation, enabling high reduction ratio, high positioning accuracy, low backlash and lightweight transmission performance. Flexsplines are widely deployed in robotic joint modules, servo actuators and precision motion control systems. In 2025, the global average selling price of flexspline products is estimated at approximately USD 50 to USD 120 per unit, while the flexspline value typically accounts for approximately 18 percent to 25 percent of the total harmonic drive system value. Industry gross margin is estimated at approximately 35 percent to 55 percent, consistent with the current precision transmission market for robotics applications.

The flexspline industry for harmonic drives is evolving from a traditional industrial robot

component market into a core precision transmission segment driven by humanoid robots and advanced intelligent equipment. Upstream supply mainly includes high strength alloy steel, heat treatment materials, precision machining equipment and cutting tools, while midstream manufacturing focuses on precision forming, fatigue life control and high consistency processing. Downstream demand covers industrial robots, collaborative robots, humanoid robots, semiconductor equipment and medical automation systems. As robotics systems require lighter weight, higher precision and greater degrees of freedom, flexspline products are continuously advancing toward thinner wall structures, compact dimensions, higher torque density and longer service life, leading to increasing technical barriers and qualification requirements across the industry.

The global supply landscape remains highly concentrated in Asia. Japanese manufacturers continue to dominate the high end market, while Chinese suppliers are rapidly expanding their market presence through localization trends, robotics capacity expansion and intelligent manufacturing investment. Industry capital expenditure has increased significantly in recent years, with more companies investing in automated heat treatment systems, integrated machining processes and digital inspection platforms to improve production consistency and fatigue durability. At the same time, growing demand from new energy equipment, lithium battery production systems and semiconductor automation is further expanding the application scope of flexspline products.

The industry is expected to maintain strong long term growth momentum over the coming years, although market differentiation will continue to intensify. High end applications are likely to remain concentrated among companies with strong technical accumulation and large scale validation capability, while lower end segments may face increasing pricing pressure. The commercialization pace of humanoid robots is expected to become one of the most important drivers of future demand, especially for lightweight, miniature and high durability flexspline products. As robotic systems continue to require more joints and higher precision motion control capability, the strategic importance of flexsplines within harmonic drive systems is expected to increase further.

This report is a detailed and comprehensive analysis for global Flexspline for Harmonic Drive market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Structure and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many

markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Flexspline for Harmonic Drive market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Flexspline for Harmonic Drive market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Flexspline for Harmonic Drive market size and forecasts, by Product Structure and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Flexspline for Harmonic Drive market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Flexspline for Harmonic Drive
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Flexspline for Harmonic Drive market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Harmonic Drive Systems Inc., Leaderdrive Technology Co., Ltd., Beijing CTKM Harmonic Drive Co., Ltd., NIDEC-SHIMPO CORPORATION, Zhejiang Laifual Drive Co., Ltd., KOFON Motion Group, HIWIN Technologies Corp., Cone Drive Operations, Inc., Shenzhen Han's Motion Technology Co., Ltd., BENRUN Robot Co., Ltd., etc.

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

Market Segmentation

Flexspline for Harmonic Drive market is split by Product Structure and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Structure, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Product Structure

Cup Type Flexspline

Hat Type Flexspline

Flanged Flexspline

Others

Market segment by Torque Class

Low Torque Flexspline (300 Nm)

Others

Market segment by Precision Grade

Standard Precision Flexspline (Backlash 3–10 arcmin)

High Precision Flexspline (Backlash 1–3 arcmin)

Ultra Precision Flexspline (Backlash

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