

Global Harmonic Joint Module Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Harmonic Joint Module market size is expected to reach \$ 246 million by 2032, rising at a market growth of 11.4% CAGR during the forecast period (2026-2032).

A harmonic joint module is a robotic joint actuation unit that integrates core components?such as a harmonic drive, motor, encoder, driver, brake, and structural elements?serving as a critical functional module for enabling rotational motion, precise positioning, and torque output in industrial, collaborative, and humanoid robots.

Centered around the harmonic drive, the module utilizes flexible deformation to achieve high reduction ratios and transmission precision, converting the motor's high-speed, low-torque output into the low-speed, high-torque motion required for robotic joints. Compared to traditional gear transmission systems, harmonic joint modules offer advantages such as high reduction ratios, high precision, high rigidity, low backlash, compact structure, and lightweight design; they are particularly well-suited for robotic joint applications with stringent requirements regarding space, weight, and motion accuracy.

These modules typically feature a compact, hollow, integrated design that combines the drive board, encoder, motor, and harmonic drive into a single unit. Some products prioritize high rigidity and high power density, integrating the drive board, dual magnetic encoders, frameless motor, and harmonic drive. By employing a flat, lightweight design that integrates drive and control functions, along with an inner-rotor hollow structure for cable routing, certain models can achieve precision levels of up to 20 arc-seconds.

The technological development of harmonic joint modules is primarily advancing toward high power density, high precision, miniaturization, intelligence, and integration. While

traditional robot joints typically consist of discrete components?motors, speed reducers, encoders, and drives?new-generation joint modules increasingly integrate these elements, resulting in more compact structural designs and simplified robot assembly processes. Core technology remains centered on harmonic reducers, focusing on aspects such as flexspline fatigue life, tooth profile design, transmission efficiency, and backlash control. Concurrently, driven by the growing demand for collaborative robots and humanoid robots, joint modules are incorporating torque sensors, absolute encoders, and intelligent control units to enable force control, safe interaction, and real-time status monitoring. Future product upgrades will prioritize high torque density, low noise, low power consumption, and module standardization.

The global robotics industry is propelled by policies supporting intelligent manufacturing, industrial automation, and artificial intelligence. China?s ongoing promotion of intelligent manufacturing, robotics industry development plans, and the localization of high-end equipment creates growth opportunities for manufacturers of core robotic components; meanwhile, countries such as Japan, Germany, and the United States are leveraging their established industrial robotics sectors to accelerate technological upgrades and expand application areas. In recent years, humanoid robots have garnered significant attention from global technology companies and capital markets, prompting supply chain enterprises?particularly those involved in core components like precision reducers, servo motors, and joint modules?to accelerate their strategic positioning. Nevertheless, the robotics industry remains in the early stages of commercialization; large-scale adoption requires further addressing challenges related to cost, reliability, supply chain stability, and the maturity of application scenarios.

Report Scope

This report studies the global Harmonic Joint Module production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Harmonic Joint Module 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 Harmonic Joint Module that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Harmonic Joint Module total production and demand, 2021-2032, (K Units)

Global Harmonic Joint Module Supply, Demand and Key Producers, 2026-2032

Global Harmonic Joint Module total production value, 2021-2032, (USD Million)

Global Harmonic Joint Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Harmonic Joint Module consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Harmonic Joint Module domestic production, consumption, key domestic manufacturers and share

Global Harmonic Joint Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Harmonic Joint Module production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Harmonic Joint Module production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Harmonic Joint Module 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 Harmonic Drive Systems, Nabtesco Corporation, Nidec Corporation, Wittenstein, Maxon Motor, Yiyou Technology, Liangzhi Joint, Juxie Intelligent, Midea Industrial, Leadshine Intelligent, 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 Harmonic Joint Module 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 Harmonic Joint Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Harmonic Joint Module Market, Segmentation by Type:

Hollow-Type Joint Module

Solid-Type Joint Module

Global Harmonic Joint Module Market, Segmentation by Outer Diameter:

40-80mm

80-120mm

Global Harmonic Joint Module Market, Segmentation by Repeat Positioning Accuracy:

15 Arcseconds

20 Arcseconds

Global Harmonic Joint Module Market, Segmentation by Application:

Humanoid Robots

Industrial Robots

Surgical Robots

Special-Purpose Robots

Others

Companies Profiled:

Harmonic Drive Systems

Nabtesco Corporation

Nidec Corporation

Wittenstein

Maxon Motor

Yiyou Technology

Liangzhi Joint

Juxie Intelligent

Midea Industrial

Leadshine Intelligent

Key Questions Answered:

1. How big is the global Harmonic Joint Module market?
2. What is the demand of the global Harmonic Joint Module market?
3. What is the year over year growth of the global Harmonic Joint Module market?
4. What is the production and production value of the global Harmonic Joint Module market?

5. Who are the key producers in the global Harmonic Joint Module market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Harmonic Joint Module Introduction
- 1.2 World Harmonic Joint Module Supply & Forecast
 - 1.2.1 World Harmonic Joint Module Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Harmonic Joint Module Production (2021-2032)
 - 1.2.3 World Harmonic Joint Module Pricing Trends (2021-2032)
- 1.3 World Harmonic Joint Module Production by Region (Based on Production Site)
 - 1.3.1 World Harmonic Joint Module Production Value by Region (2021-2032)
 - 1.3.2 World Harmonic Joint Module Production by Region (2021-2032)
 - 1.3.3 World Harmonic Joint Module Average Price by Region (2021-2032)
 - 1.3.4 North America Harmonic Joint Module Production (2021-2032)
 - 1.3.5 Europe Harmonic Joint Module Production (2021-2032)
 - 1.3.6 China Harmonic Joint Module Production (2021-2032)
 - 1.3.7 Japan Harmonic Joint Module Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Harmonic Joint Module Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Harmonic Joint Module Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Harmonic Joint Module Demand (2021-2032)
- 2.2 World Harmonic Joint Module Consumption by Region
 - 2.2.1 World Harmonic Joint Module Consumption by Region (2021-2026)
 - 2.2.2 World Harmonic Joint Module Consumption Forecast by Region (2027-2032)
- 2.3 United States Harmonic Joint Module Consumption (2021-2032)
- 2.4 China Harmonic Joint Module Consumption (2021-2032)
- 2.5 Europe Harmonic Joint Module Consumption (2021-2032)
- 2.6 Japan Harmonic Joint Module Consumption (2021-2032)
- 2.7 South Korea Harmonic Joint Module Consumption (2021-2032)
- 2.8 ASEAN Harmonic Joint Module Consumption (2021-2032)
- 2.9 India Harmonic Joint Module Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Harmonic Joint Module Production Value by Manufacturer (2021-2026)

- 3.2 World Harmonic Joint Module Production by Manufacturer (2021-2026)
- 3.3 World Harmonic Joint Module Average Price by Manufacturer (2021-2026)
- 3.4 Harmonic Joint Module Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Harmonic Joint Module Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Harmonic Joint Module in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Harmonic Joint Module in 2025
- 3.6 Harmonic Joint Module Market: Overall Company Footprint Analysis
 - 3.6.1 Harmonic Joint Module Market: Region Footprint
 - 3.6.2 Harmonic Joint Module Market: Company Product Type Footprint
 - 3.6.3 Harmonic Joint Module Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Harmonic Joint Module Production Value Comparison
 - 4.1.1 United States VS China: Harmonic Joint Module Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Harmonic Joint Module Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Harmonic Joint Module Production Comparison
 - 4.2.1 United States VS China: Harmonic Joint Module Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Harmonic Joint Module Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Harmonic Joint Module Consumption Comparison
 - 4.3.1 United States VS China: Harmonic Joint Module Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Harmonic Joint Module Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Harmonic Joint Module Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Harmonic Joint Module Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Harmonic Joint Module Production Value (2021-2026)

4.4.3 United States Based Manufacturers Harmonic Joint Module Production (2021-2026)

4.5 China Based Harmonic Joint Module Manufacturers and Market Share

4.5.1 China Based Harmonic Joint Module Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Harmonic Joint Module Production Value (2021-2026)

4.5.3 China Based Manufacturers Harmonic Joint Module Production (2021-2026)

4.6 Rest of World Based Harmonic Joint Module Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Harmonic Joint Module Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Harmonic Joint Module Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Harmonic Joint Module Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Harmonic Joint Module Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Hollow-Type Joint Module

5.2.2 Solid-Type Joint Module

5.3 Market Segment by Type

5.3.1 World Harmonic Joint Module Production by Type (2021-2032)

5.3.2 World Harmonic Joint Module Production Value by Type (2021-2032)

5.3.3 World Harmonic Joint Module Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY OUTER DIAMETER

6.1 World Harmonic Joint Module Market Size Overview by Outer Diameter: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Outer Diameter

6.2.1 40-80mm

6.2.2 80-120mm

6.3 Market Segment by Outer Diameter

- 6.3.1 World Harmonic Joint Module Production by Outer Diameter (2021-2032)
- 6.3.2 World Harmonic Joint Module Production Value by Outer Diameter (2021-2032)
- 6.3.3 World Harmonic Joint Module Average Price by Outer Diameter (2021-2032)

7 MARKET ANALYSIS BY REPEAT POSITIONING ACCURACY

- 7.1 World Harmonic Joint Module Market Size Overview by Repeat Positioning Accuracy: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Repeat Positioning Accuracy
 - 7.2.1 15 Arcseconds
 - 7.2.2 20 Arcseconds
- 7.3 Market Segment by Repeat Positioning Accuracy
 - 7.3.1 World Harmonic Joint Module Production by Repeat Positioning Accuracy (2021-2032)
 - 7.3.2 World Harmonic Joint Module Production Value by Repeat Positioning Accuracy (2021-2032)
 - 7.3.3 World Harmonic Joint Module Average Price by Repeat Positioning Accuracy (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

- 8.1 World Harmonic Joint Module Market Size Overview by Application: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction by Application
 - 8.2.1 Humanoid Robots
 - 8.2.2 Industrial Robots
 - 8.2.3 Surgical Robots
 - 8.2.4 Special-Purpose Robots
 - 8.2.5 Others
- 8.3 Market Segment by Application
 - 8.3.1 World Harmonic Joint Module Production by Application (2021-2032)
 - 8.3.2 World Harmonic Joint Module Production Value by Application (2021-2032)
 - 8.3.3 World Harmonic Joint Module Average Price by Application (2021-2032)

9 COMPANY PROFILES

- 9.1 Harmonic Drive Systems
 - 9.1.1 Harmonic Drive Systems Details
 - 9.1.2 Harmonic Drive Systems Major Business

- 9.1.3 Harmonic Drive Systems Harmonic Joint Module Product and Services
- 9.1.4 Harmonic Drive Systems Harmonic Joint Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 Harmonic Drive Systems Recent Developments/Updates
- 9.1.6 Harmonic Drive Systems Competitive Strengths & Weaknesses
- 9.2 Nabtesco Corporation
 - 9.2.1 Nabtesco Corporation Details
 - 9.2.2 Nabtesco Corporation Major Business
 - 9.2.3 Nabtesco Corporation Harmonic Joint Module Product and Services
 - 9.2.4 Nabtesco Corporation Harmonic Joint Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.2.5 Nabtesco Corporation Recent Developments/Updates
 - 9.2.6 Nabtesco Corporation Competitive Strengths & Weaknesses
- 9.3 Nidec Corporation
 - 9.3.1 Nidec Corporation Details
 - 9.3.2 Nidec Corporation Major Business
 - 9.3.3 Nidec Corporation Harmonic Joint Module Product and Services
 - 9.3.4 Nidec Corporation Harmonic Joint Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Nidec Corporation Recent Developments/Updates
 - 9.3.6 Nidec Corporation Competitive Strengths & Weaknesses
- 9.4 Wittenstein
 - 9.4.1 Wittenstein Details
 - 9.4.2 Wittenstein Major Business
 - 9.4.3 Wittenstein Harmonic Joint Module Product and Services
 - 9.4.4 Wittenstein Harmonic Joint Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Wittenstein Recent Developments/Updates
 - 9.4.6 Wittenstein Competitive Strengths & Weaknesses
- 9.5 Maxon Motor
 - 9.5.1 Maxon Motor Details
 - 9.5.2 Maxon Motor Major Business
 - 9.5.3 Maxon Motor Harmonic Joint Module Product and Services
 - 9.5.4 Maxon Motor Harmonic Joint Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Maxon Motor Recent Developments/Updates
 - 9.5.6 Maxon Motor Competitive Strengths & Weaknesses
- 9.6 Yiyou Technology
 - 9.6.1 Yiyou Technology Details

- 9.6.2 Yiyou Technology Major Business
- 9.6.3 Yiyou Technology Harmonic Joint Module Product and Services
- 9.6.4 Yiyou Technology Harmonic Joint Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 Yiyou Technology Recent Developments/Updates
- 9.6.6 Yiyou Technology Competitive Strengths & Weaknesses
- 9.7 Liangzhi Joint
 - 9.7.1 Liangzhi Joint Details
 - 9.7.2 Liangzhi Joint Major Business
 - 9.7.3 Liangzhi Joint Harmonic Joint Module Product and Services
 - 9.7.4 Liangzhi Joint Harmonic Joint Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 Liangzhi Joint Recent Developments/Updates
 - 9.7.6 Liangzhi Joint Competitive Strengths & Weaknesses
- 9.8 Juxie Intelligent
 - 9.8.1 Juxie Intelligent Details
 - 9.8.2 Juxie Intelligent Major Business
 - 9.8.3 Juxie Intelligent Harmonic Joint Module Product and Services
 - 9.8.4 Juxie Intelligent Harmonic Joint Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Juxie Intelligent Recent Developments/Updates
 - 9.8.6 Juxie Intelligent Competitive Strengths & Weaknesses
- 9.9 Midea Industrial
 - 9.9.1 Midea Industrial Details
 - 9.9.2 Midea Industrial Major Business
 - 9.9.3 Midea Industrial Harmonic Joint Module Product and Services
 - 9.9.4 Midea Industrial Harmonic Joint Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Midea Industrial Recent Developments/Updates
 - 9.9.6 Midea Industrial Competitive Strengths & Weaknesses
- 9.10 Leadshine Intelligent
 - 9.10.1 Leadshine Intelligent Details
 - 9.10.2 Leadshine Intelligent Major Business
 - 9.10.3 Leadshine Intelligent Harmonic Joint Module Product and Services
 - 9.10.4 Leadshine Intelligent Harmonic Joint Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Leadshine Intelligent Recent Developments/Updates
 - 9.10.6 Leadshine Intelligent Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Harmonic Joint Module Industry Chain

10.2 Harmonic Joint Module Upstream Analysis

10.2.1 Harmonic Joint Module Core Raw Materials

10.2.2 Main Manufacturers of Harmonic Joint Module Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Harmonic Joint Module Production Mode

10.6 Harmonic Joint Module Procurement Model

10.7 Harmonic Joint Module Industry Sales Model and Sales Channels

10.7.1 Harmonic Joint Module Sales Model

10.7.2 Harmonic Joint Module Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Harmonic Joint Module Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Harmonic Joint Module Production Value by Region (2021-2026) & (USD Million)

Table 3. World Harmonic Joint Module Production Value by Region (2027-2032) & (USD Million)

Table 4. World Harmonic Joint Module Production Value Market Share by Region (2021-2026)

Table 5. World Harmonic Joint Module Production Value Market Share by Region (2027-2032)

Table 6. World Harmonic Joint Module Production by Region (2021-2026) & (K Units)

Table 7. World Harmonic Joint Module Production by Region (2027-2032) & (K Units)

Table 8. World Harmonic Joint Module Production Market Share by Region (2021-2026)

Table 9. World Harmonic Joint Module Production Market Share by Region (2027-2032)

Table 10. World Harmonic Joint Module Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Harmonic Joint Module Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Harmonic Joint Module Major Market Trends

Table 13. World Harmonic Joint Module Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Harmonic Joint Module Consumption by Region (2021-2026) & (K Units)

Table 15. World Harmonic Joint Module Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Harmonic Joint Module Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Harmonic Joint Module Producers in 2025

Table 18. World Harmonic Joint Module Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Harmonic Joint Module Producers in 2025

Table 20. World Harmonic Joint Module Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Harmonic Joint Module Company Evaluation Quadrant

Table 22. World Harmonic Joint Module Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Harmonic Joint Module Production Site of Key Manufacturer

Table 24. Harmonic Joint Module Market: Company Product Type Footprint

Table 25. Harmonic Joint Module Market: Company Product Application Footprint

Table 26. Harmonic Joint Module Competitive Factors

Table 27. Harmonic Joint Module New Entrant and Capacity Expansion Plans

Table 28. Harmonic Joint Module Mergers & Acquisitions Activity

Table 29. United States VS China Harmonic Joint Module Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Harmonic Joint Module Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Harmonic Joint Module Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Harmonic Joint Module Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Harmonic Joint Module Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Harmonic Joint Module Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Harmonic Joint Module Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Harmonic Joint Module Production Market Share (2021-2026)

Table 37. China Based Harmonic Joint Module Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Harmonic Joint Module Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Harmonic Joint Module Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Harmonic Joint Module Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Harmonic Joint Module Production Market Share (2021-2026)

Table 42. Rest of World Based Harmonic Joint Module Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Harmonic Joint Module Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Harmonic Joint Module Production Value

Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Harmonic Joint Module Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Harmonic Joint Module Production Market Share (2021-2026)

Table 47. World Harmonic Joint Module Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Harmonic Joint Module Production by Type (2021-2026) & (K Units)

Table 49. World Harmonic Joint Module Production by Type (2027-2032) & (K Units)

Table 50. World Harmonic Joint Module Production Value by Type (2021-2026) & (USD Million)

Table 51. World Harmonic Joint Module Production Value by Type (2027-2032) & (USD Million)

Table 52. World Harmonic Joint Module Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Harmonic Joint Module Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Harmonic Joint Module Production Value by Outer Diameter, (USD Million), 2021 & 2025 & 2032

Table 55. World Harmonic Joint Module Production by Outer Diameter (2021-2026) & (K Units)

Table 56. World Harmonic Joint Module Production by Outer Diameter (2027-2032) & (K Units)

Table 57. World Harmonic Joint Module Production Value by Outer Diameter (2021-2026) & (USD Million)

Table 58. World Harmonic Joint Module Production Value by Outer Diameter (2027-2032) & (USD Million)

Table 59. World Harmonic Joint Module Average Price by Outer Diameter (2021-2026) & (US\$/Unit)

Table 60. World Harmonic Joint Module Average Price by Outer Diameter (2027-2032) & (US\$/Unit)

Table 61. World Harmonic Joint Module Production Value by Repeat Positioning Accuracy, (USD Million), 2021 & 2025 & 2032

Table 62. World Harmonic Joint Module Production by Repeat Positioning Accuracy (2021-2026) & (K Units)

Table 63. World Harmonic Joint Module Production by Repeat Positioning Accuracy (2027-2032) & (K Units)

Table 64. World Harmonic Joint Module Production Value by Repeat Positioning Accuracy (2021-2026) & (USD Million)

Table 65. World Harmonic Joint Module Production Value by Repeat Positioning Accuracy (2027-2032) & (USD Million)

Table 66. World Harmonic Joint Module Average Price by Repeat Positioning Accuracy (2021-2026) & (US\$/Unit)

Table 67. World Harmonic Joint Module Average Price by Repeat Positioning Accuracy (2027-2032) & (US\$/Unit)

Table 68. World Harmonic Joint Module Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Harmonic Joint Module Production by Application (2021-2026) & (K Units)

Table 70. World Harmonic Joint Module Production by Application (2027-2032) & (K Units)

Table 71. World Harmonic Joint Module Production Value by Application (2021-2026) & (USD Million)

Table 72. World Harmonic Joint Module Production Value by Application (2027-2032) & (USD Million)

Table 73. World Harmonic Joint Module Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Harmonic Joint Module Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Harmonic Drive Systems Basic Information, Manufacturing Base and Competitors

Table 76. Harmonic Drive Systems Major Business

Table 77. Harmonic Drive Systems Harmonic Joint Module Product and Services

Table 78. Harmonic Drive Systems Harmonic Joint Module Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Harmonic Drive Systems Recent Developments/Updates

Table 80. Harmonic Drive Systems Competitive Strengths & Weaknesses

Table 81. Nabtesco Corporation Basic Information, Manufacturing Base and Competitors

Table 82. Nabtesco Corporation Major Business

Table 83. Nabtesco Corporation Harmonic Joint Module Product and Services

Table 84. Nabtesco Corporation Harmonic Joint Module Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Nabtesco Corporation Recent Developments/Updates

Table 86. Nabtesco Corporation Competitive Strengths & Weaknesses

Table 87. Nidec Corporation Basic Information, Manufacturing Base and Competitors

Table 88. Nidec Corporation Major Business
Table 89. Nidec Corporation Harmonic Joint Module Product and Services
Table 90. Nidec Corporation Harmonic Joint Module Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Nidec Corporation Recent Developments/Updates
Table 92. Nidec Corporation Competitive Strengths & Weaknesses
Table 93. Wittenstein Basic Information, Manufacturing Base and Competitors
Table 94. Wittenstein Major Business
Table 95. Wittenstein Harmonic Joint Module Product and Services
Table 96. Wittenstein Harmonic Joint Module Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Wittenstein Recent Developments/Updates
Table 98. Wittenstein Competitive Strengths & Weaknesses
Table 99. Maxon Motor Basic Information, Manufacturing Base and Competitors
Table 100. Maxon Motor Major Business
Table 101. Maxon Motor Harmonic Joint Module Product and Services
Table 102. Maxon Motor Harmonic Joint Module Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Maxon Motor Recent Developments/Updates
Table 104. Maxon Motor Competitive Strengths & Weaknesses
Table 105. Yiyu Technology Basic Information, Manufacturing Base and Competitors
Table 106. Yiyu Technology Major Business
Table 107. Yiyu Technology Harmonic Joint Module Product and Services
Table 108. Yiyu Technology Harmonic Joint Module Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Yiyu Technology Recent Developments/Updates
Table 110. Yiyu Technology Competitive Strengths & Weaknesses
Table 111. Liangzhi Joint Basic Information, Manufacturing Base and Competitors
Table 112. Liangzhi Joint Major Business
Table 113. Liangzhi Joint Harmonic Joint Module Product and Services
Table 114. Liangzhi Joint Harmonic Joint Module Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Liangzhi Joint Recent Developments/Updates
Table 116. Liangzhi Joint Competitive Strengths & Weaknesses
Table 117. Juxie Intelligent Basic Information, Manufacturing Base and Competitors
Table 118. Juxie Intelligent Major Business
Table 119. Juxie Intelligent Harmonic Joint Module Product and Services

Table 120. Juxie Intelligent Harmonic Joint Module Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Juxie Intelligent Recent Developments/Updates

Table 122. Juxie Intelligent Competitive Strengths & Weaknesses

Table 123. Midea Industrial Basic Information, Manufacturing Base and Competitors

Table 124. Midea Industrial Major Business

Table 125. Midea Industrial Harmonic Joint Module Product and Services

Table 126. Midea Industrial Harmonic Joint Module Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Midea Industrial Recent Developments/Updates

Table 128. Midea Industrial Competitive Strengths & Weaknesses

Table 129. Leadshine Intelligent Basic Information, Manufacturing Base and Competitors

Table 130. Leadshine Intelligent Major Business

Table 131. Leadshine Intelligent Harmonic Joint Module Product and Services

Table 132. Leadshine Intelligent Harmonic Joint Module Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Leadshine Intelligent Recent Developments/Updates

Table 134. Leadshine Intelligent Competitive Strengths & Weaknesses

Table 135. Global Key Players of Harmonic Joint Module Upstream (Raw Materials)

Table 136. Global Harmonic Joint Module Typical Customers

Table 137. Harmonic Joint Module Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Harmonic Joint Module Picture

Figure 2. World Harmonic Joint Module Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Harmonic Joint Module Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Harmonic Joint Module Production (2021-2032) & (K Units)

Figure 5. World Harmonic Joint Module Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Harmonic Joint Module Production Value Market Share by Region (2021-2032)

Figure 7. World Harmonic Joint Module Production Market Share by Region (2021-2032)

Figure 8. North America Harmonic Joint Module Production (2021-2032) & (K Units)

Figure 9. Europe Harmonic Joint Module Production (2021-2032) & (K Units)

Figure 10. China Harmonic Joint Module Production (2021-2032) & (K Units)

Figure 11. Japan Harmonic Joint Module Production (2021-2032) & (K Units)

Figure 12. Harmonic Joint Module Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Harmonic Joint Module Consumption (2021-2032) & (K Units)

Figure 15. World Harmonic Joint Module Consumption Market Share by Region (2021-2032)

Figure 16. United States Harmonic Joint Module Consumption (2021-2032) & (K Units)

Figure 17. China Harmonic Joint Module Consumption (2021-2032) & (K Units)

Figure 18. Europe Harmonic Joint Module Consumption (2021-2032) & (K Units)

Figure 19. Japan Harmonic Joint Module Consumption (2021-2032) & (K Units)

Figure 20. South Korea Harmonic Joint Module Consumption (2021-2032) & (K Units)

Figure 21. ASEAN Harmonic Joint Module Consumption (2021-2032) & (K Units)

Figure 22. India Harmonic Joint Module Consumption (2021-2032) & (K Units)

Figure 23. Producer Shipments of Harmonic Joint Module by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Harmonic Joint Module Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Harmonic Joint Module Markets in 2025

Figure 26. United States VS China: Harmonic Joint Module Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Harmonic Joint Module Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Harmonic Joint Module Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Harmonic Joint Module Production Market Share 2025

Figure 30. China Based Manufacturers Harmonic Joint Module Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Harmonic Joint Module Production Market Share 2025

Figure 32. World Harmonic Joint Module Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Harmonic Joint Module Production Value Market Share by Type in 2025

Figure 34. Hollow-Type Joint Module

Figure 35. Solid-Type Joint Module

Figure 36. World Harmonic Joint Module Production Market Share by Type (2021-2032)

Figure 37. World Harmonic Joint Module Production Value Market Share by Type (2021-2032)

Figure 38. World Harmonic Joint Module Average Price by Type (2021-2032) & (US\$/Unit)

Figure 39. World Harmonic Joint Module Production Value by Outer Diameter, (USD Million), 2021 & 2025 & 2032

Figure 40. World Harmonic Joint Module Production Value Market Share by Outer Diameter in 2025

Figure 41. 40-80mm

Figure 42. 80-120mm

Figure 43. World Harmonic Joint Module Production Market Share by Outer Diameter (2021-2032)

Figure 44. World Harmonic Joint Module Production Value Market Share by Outer Diameter (2021-2032)

Figure 45. World Harmonic Joint Module Average Price by Outer Diameter (2021-2032) & (US\$/Unit)

Figure 46. World Harmonic Joint Module Production Value by Repeat Positioning Accuracy, (USD Million), 2021 & 2025 & 2032

Figure 47. World Harmonic Joint Module Production Value Market Share by Repeat Positioning Accuracy in 2025

Figure 48. 15 Arcseconds

Figure 49. 20 Arcseconds

- Figure 50. World Harmonic Joint Module Production Market Share by Repeat Positioning Accuracy (2021-2032)
- Figure 51. World Harmonic Joint Module Production Value Market Share by Repeat Positioning Accuracy (2021-2032)
- Figure 52. World Harmonic Joint Module Average Price by Repeat Positioning Accuracy (2021-2032) & (US\$/Unit)
- Figure 53. World Harmonic Joint Module Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 54. World Harmonic Joint Module Production Value Market Share by Application in 2025
- Figure 55. Humanoid Robots
- Figure 56. Industrial Robots
- Figure 57. Surgical Robots
- Figure 58. Special-Purpose Robots
- Figure 59. Others
- Figure 60. World Harmonic Joint Module Production Market Share by Application (2021-2032)
- Figure 61. World Harmonic Joint Module Production Value Market Share by Application (2021-2032)
- Figure 62. World Harmonic Joint Module Average Price by Application (2021-2032) & (US\$/Unit)
- Figure 63. Harmonic Joint Module Industry Chain
- Figure 64. Harmonic Joint Module Procurement Model
- Figure 65. Harmonic Joint Module Sales Model
- Figure 66. Harmonic Joint Module Sales Channels, Direct Sales, and Distribution
- Figure 67. Methodology
- Figure 68. Research Process and Data Source

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