

# Global Harmonic Reducer for Humanoid Robot Rotating Joint Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Harmonic Reducer for Humanoid Robot Rotating Joint market size is expected to reach \$ 1035 million by 2032, rising at a market growth of 34.2% CAGR during the forecast period (2026-2032).

The harmonic reducer for humanoid robot rotating joint is a core component that ensures high precision and stability of robot motion control by reducing speed and increasing torque, serving as an intermediate structure connecting the power source and the execution mechanism, composed of three basic components: a wave generator, a flex spline, and a circular spline, featuring a large single-stage transmission ratio, compact size, and simple structure, primarily used in parts such as the small arm, wrist, and hand that require high-precision transmission. The harmonic reducer achieves power transmission through the periodic deformation of the flex spline, effectively improving the motion accuracy and response speed of the rotating joint while meeting the requirements for lightweight and compactness in humanoid robots. Its high transmission ratio and precision enable the rotating joint to maintain stability during complex movements, while low noise and high efficiency further optimize the overall performance of the joint. Additionally, the structural design of the harmonic reducer allows it to adapt to enclosed spaces and radiation conditions, providing reliable power support for the rotating joints of humanoid robots. In 2025, global Harmonic Reducer for Humanoid Robot Rotating Joint production reached approximately 608 k units with an average global market price of around US\$210 per unit.

The future industry trends for Harmonic Reducer for Humanoid Robot Rotating Joint will feature the dual characteristics of accelerated domestic substitution and expanded market space. As the commercialization process of humanoid robots accelerates, the

demand for harmonic reducers, as core components of rotary actuators, will continue to grow, driving domestic manufacturers to increase their market share through technological breakthroughs. Domestic enterprises are gradually breaking overseas monopolies and achieving independent research and development in key technologies such as gear design, and combined with the enhanced industrial drive brought by the volume launch of humanoid robots, the process of domestic substitution is expected to accelerate significantly. The industry competitive landscape will concentrate on leading enterprises, and manufacturers with technical advantages and production scale will benefit from industrial chain integration and cost optimization to further consolidate their market position. At the same time, innovations in materials and structures of harmonic reducers will become an important development direction, and manufacturers will commit to improving load capacity, reducing vibration and noise, and lowering production costs to meet the requirements of humanoid robots for lightweight and high precision. In the long run, the explosive growth of the humanoid robot industry will bring sustained revenue and profit growth momentum to the harmonic reducer industry, promoting the synergistic development of the upstream and downstream of the industrial chain.

This report studies the global Harmonic Reducer for Humanoid Robot Rotating Joint production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Harmonic Reducer for Humanoid Robot Rotating Joint total production and demand, 2021-2032, (K Units)

Global Harmonic Reducer for Humanoid Robot Rotating Joint total production value, 2021-2032, (USD Million)

Global Harmonic Reducer for Humanoid Robot Rotating Joint production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Harmonic Reducer for Humanoid Robot Rotating Joint consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Harmonic Reducer for Humanoid Robot Rotating Joint domestic

production, consumption, key domestic manufacturers and share  
Global Harmonic Reducer for Humanoid Robot Rotating Joint production by  
manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K  
Units)

Global Harmonic Reducer for Humanoid Robot Rotating Joint production by Type,  
production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Harmonic Reducer for Humanoid Robot Rotating Joint production by Application,  
production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Harmonic Reducer for Humanoid Robot  
Rotating Joint 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, Nidec-Shimpo, Schaeffler, ILJIN Motion & Control GmbH, SBB Tech, GAM  
Enterprise, OVALO GmbH, Leader Harmonious Drive Systems, Zhejiang Laifual Drive,  
Shenzhen PICEA Motion Technology, 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 Reducer for Humanoid Robot Rotating Joint  
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 Reducer for Humanoid Robot Rotating Joint Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Harmonic Reducer for Humanoid Robot Rotating Joint Market, Segmentation by Type:

Standard Harmonic Reducer

High-Torque Harmonic Reducer

Global Harmonic Reducer for Humanoid Robot Rotating Joint Market, Segmentation by Reduction Ratio:

30:1 / 50:1

80:1 / 100:1

120:1 / 160:1

200:1 and Above

Global Harmonic Reducer for Humanoid Robot Rotating Joint Market, Segmentation by Hollow Bore Structure:

>20 mm

20–50 mm

50–100 mm

?100 mm

Global Harmonic Reducer for Humanoid Robot Rotating Joint Market, Segmentation by Application:

Upper Limb Joints

Lower Limb Joints

Hand Joints

Others

Companies Profiled:

Harmonic Drive

Nidec-Shimpo

Schaeffler

ILJIN Motion & Control GmbH

SBB Tech

GAM Enterprise

OVALO GmbH

Leader Harmonious Drive Systems

Zhejiang Laifual Drive

Shenzhen PICEA Motion Technology

Shenzhen TC Drive Technologies

HIWIN Technologies

LI MING Machinery

MAIN DRIVE Corporation

Chengdu RDW Motor

Guangzhou Haozhi Industrial

Sichuan TLIBOT

Ningbo Zhongda Leader Intelligent Transmission

Dongguan BenRun Robot Technology

Beijing CTKM Harmonic Drive

Hubei Kofon Transmission Equipment

Zhejiang Sling Intelligent Drive Group

Chengdu Reach Machinery

#### Key Questions Answered:

1. How big is the global Harmonic Reducer for Humanoid Robot Rotating Joint market?
2. What is the demand of the global Harmonic Reducer for Humanoid Robot Rotating Joint market?
3. What is the year over year growth of the global Harmonic Reducer for Humanoid Robot Rotating Joint market?
4. What is the production and production value of the global Harmonic Reducer for Humanoid Robot Rotating Joint market?
5. Who are the key producers in the global Harmonic Reducer for Humanoid Robot Rotating Joint market?
6. What are the growth factors driving the market demand?

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