

# Global Humanoid Robot Bearings Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Humanoid Robot Bearings market size is expected to reach \$ 856 million by 2032, rising at a market growth of 45.5% CAGR during the forecast period (2026-2032).

Humanoid robots are emerging as a new class of multi-axis, human-scale machines designed to operate in environments originally built for people. Their joints must deliver high torque, wide range of motion, and precise, repeatable positioning under complex, multi-directional loads. Bearings are a foundational element of this motion system: in robotics they provide low-friction rotation, maintain alignment under dynamic loads, and enable the precision needed for industrial, collaborative and service robots.

Within this context, humanoid robot bearings form a distinct niche inside the broader robot bearings market. They combine the functional requirements of high-end industrial robots with the size, weight and safety constraints specific to humanoid form factors.

Humanoid robot bearings, as defined in this report, refer to the family of rolling-element bearings and closely related support components that provide motion support for humanoid robot joints and load-bearing structures. Compared with bearings used in traditional industrial robots or general machinery, humanoid robot bearings must operate in highly compact, anthropomorphic envelopes, withstand complex combinations of radial, axial and overturning loads, and support backdrivable, low-friction, low-noise motion suitable for close interaction with humans. They are key mechanical elements in hips, knees, ankles, shoulders, elbows, wrists, necks, waists and dexterous hands, and they directly influence the robot's stiffness, dynamic stability, energy efficiency and safety.

From a product-type perspective, the report classifies humanoid robot bearings into six

major categories: deep groove ball bearings, four-point contact bearings, angular contact bearings, crossed-roller bearings, flexible bearings, and other bearings.

? Deep groove ball bearings are widely used in motors, intermediate shafts and moderate-load rotational elements. In humanoids they often appear in high-speed joint drives and auxiliary axes where good speed capability, low noise and acceptable stiffness are required at relatively low cost.

? Four-point contact bearings provide combined radial and axial load capacity in a single row and are applied in compact joints and structural pivots where bidirectional thrust and space constraints rule out multi-row arrangements.

? Angular contact bearings support higher axial loads and stiffness, frequently in paired or back-to-back configurations. They are important in motor shafts, ball-screw supports and reducer interfaces that demand accurate positioning and torque transmission.

? Crossed-roller bearings are a hallmark of humanoid joints: by crossing cylindrical rollers at 90°, they can carry radial, axial and moment loads simultaneously, making them ideal for hip, knee, shoulder and wrist joints that experience large bending moments and complex dynamic loads.

? Flexible bearings (flexspline bearings) are thin-walled, deformable bearings used inside strain-wave/harmonic drives and other compact, high-ratio reducers. They must accommodate cyclic elastic deformation while maintaining fatigue life, precision and controlled torque ripple, and they are central to high-torque, high-reduction humanoid joint modules.

? The ?other bearings? category includes tapered-roller, cylindrical-roller, spherical plain, miniature bearings, linear guides and customised units?covering specific needs in reducers, linear joints, torso support structures and non-standard DOFs.

In addition to type-based classification, the report maps humanoid robot bearings by humanoid structure and joint application. By structure, the main buckets are neck, waist, arm, leg, dexterous hand and other structures, corresponding to where the bearing sits in the humanoid body. Quantitative modelling shows that leg and arm bearings account for the largest share of market value, reflecting the high forces and joint counts involved in bipedal locomotion and manipulation, while dexterous hand bearings are the fastest-growing category as humanoids adopt higher-DOF hands for industrial and service tasks. By joint application, the report distinguishes linear joints, rotational joints,

dexterous hand joints and other joints, each with different load cases, packaging constraints and ASP trajectories. Rotational joints dominate both volume and value, but linear and dexterous joints impose specific design demands on noise, friction, backlash and fingertip force resolution.

In 2025, the global production of Humanoid Robot Bearings is estimated at 1,836,750 units, with an average selling price of US\$18.4 per unit and a gross profit margin of approximately 22.93%.

The global humanoid robot bearings market is at a very early but extremely fast-accelerating stage. In value terms, the market expanded from around US\$0.62 million in 2021 to about US\$33.80 million in 2025, and is projected to reach roughly US\$871.69 million by 2032. This implies an average annual growth rate of over 170% during 2021-2025, a sharp step-up in 2025-2026 as large pilot fleets are launched, and a still-very-high CAGR of about 46.6% in 2026-2032 as humanoid robots ramp from demonstrators to scaled deployment. Pricing trends at the joint level show that average selling prices (ASPs) per humanoid robot bearing fall from roughly US\$30 per unit in 2021 to about US\$18 in 2025 and US\$12-13 by 2032, indicating that revenue growth is driven primarily by explosive unit-volume expansion and progressive standardisation rather than price inflation.

From a product-type perspective, the market is segmented into deep groove ball bearings, four-point contact bearings, angular contact bearings, crossed-roller bearings, flexible bearings (for example flexspline bearings in harmonic drives), and other bearings. In 2025, deep groove and crossed-roller bearings together account for just over half of global revenue, while flexible bearings remain a smaller but rapidly scaling niche. By 2032, the mix shifts markedly: flexible bearings are expected to contribute roughly one-third of total market value, with crossed-roller bearings at just above 20%, and deep-groove and angular-contact bearings together falling below one-third. This reflects the increasing penetration of strain-wave and other compact, high-ratio drive systems in humanoid joints, as well as the central role of large-diameter crossed-roller rings in hips, knees, shoulders and integrated joint modules.

Viewed through the lens of humanoid robot structure, bearings serving legs and arms form the core of market demand. In 2025, leg joints account for around 40-45% of humanoid robot bearing revenue, with arm joints contributing roughly a quarter; neck, waist and other structural positions together remain below 20%. By 2032, leg and arm bearings still dominate, but the dexterous hand category becomes a major growth engine: its revenue share roughly doubles from the low-teens in 2025 to about one-fifth

of the total market by 2032, supported by the proliferation of multi-fingered end-effectors and higher joint counts per humanoid. This structural view underlines that most of the value pool is tied to high-load locomotion joints and high-DOF manipulation joints.

Geographically, the humanoid robot bearings market is highly asymmetric. In 2025, Asia-Pacific already contributes more than 90% of global sales value, or about US\$30.86 million out of US\$33.80 million, driven primarily by China's rapid build-out of humanoid robot platforms, joint modules and robot-grade bearing capacity. North America and Europe together represent less than 10% at this stage. Looking ahead to 2032, regional revenue is forecast to reach about US\$598.48 million in Asia-Pacific, US\$134.91 million in North America, US\$105.37 million in Europe, with Latin America and the Middle East & Africa growing from a very small base. Asia-Pacific's share is expected to normalise from above 90% to roughly 70%, while North America and Europe collectively approach 30%, reflecting the spread of humanoid applications and supply capacity from China to other major industrial regions.

At the level of joint application, the report identifies linear joints, rotational joints, dexterous hand joints and other joints as distinct ASP and value buckets. Rotational joints represent the largest and most technically demanding category, requiring bearings that combine radial, axial and moment-load capacity in compact envelopes and are often integrated directly into high-ratio gearheads. Linear joints typically rely on recirculating ball guides or similar components and remain a minority share of total unit volume but are strategically important for certain tasks and underactuated mechanisms. Dexterous hand joints emphasise miniaturisation, low friction torque and tight torque dispersion, as they directly determine manipulators' precision and haptic behaviour. Overall, joint-level ASPs trend steadily downward across all categories through 2032, with rotational joints retaining the highest absolute price level and 'other joints' showing the largest ASP compression as volumes scale.

On the supply-side, humanoid robot bearings are emerging as a premium niche within the broader bearing industry. The value chain requires integrated control of metallurgy, heat treatment, precision grinding, super-finishing, metrology, contamination control and life testing, coupled with application-specific engineering for backdrivability, stiffness, noise and safety.

Capacity is ramping from negligible levels in 2021 to sizeable volumes by 2026, with a number of companies planning tens of millions of units of annual capacity across thin-wall, flexible and crossed-roller families.

Japan, Europe and China lead in high-precision capability, with China building dense clusters in Zhejiang, Shanghai, Henan, Shandong and Fujian as major global bases for robot-grade bearings and joint modules.

Profitability is currently attractive: humanoid-grade bearings typically exhibit gross margins in the high-20% to mid-30% range for global majors and precision specialists, and up to the 40-50% range for some focused Chinese humanoid platforms during the initial scale-up window.

However, the market also faces material, capacity and regulatory constraints. Volatility in high-grade bearing steel pricing, shared use of precision manufacturing assets across multiple high-end bearing segments, and geographic concentration of advanced bearing and actuator capabilities all create supply-chain risks for humanoid programs. On the economic side, high R&D and manufacturing costs for humanoid systems exert strong cost-down pressure on key components, while early generations of humanoid bearings still involve customised, low-volume designs that limit economies of scale. Evolving safety standards and prospective humanoid-specific norms will raise documentation, traceability and qualification requirements for bearings used in safety-critical joints.

Overall, the report concludes that humanoid robot bearings will evolve from a tiny, project-driven niche into a large, structurally growing component market over 2026-2032. Value creation will concentrate in bearings and integrated joint modules that directly enable dynamic bipedal locomotion, high-DOF manipulation and long-life, low-noise service operation, while more generic positions gradually commoditise. For bearing manufacturers, success will depend on early co-design with humanoid OEMs and joint-module suppliers, disciplined capacity ramp-up, and careful navigation of cost, qualification and safety requirements along the path from prototypes to mass deployment.

This report studies the global Humanoid Robot Bearings production, demand, key manufacturers, and key regions.

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

## **Highlights and key features of the study**

Global Humanoid Robot Bearings total production and demand, 2021-2032, (K Units)  
Global Humanoid Robot Bearings total production value, 2021-2032, (USD Million)  
Global Humanoid Robot Bearings production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)  
Global Humanoid Robot Bearings consumption by region & country, CAGR, 2021-2032 & (K Units)  
U.S. VS China: Humanoid Robot Bearings domestic production, consumption, key domestic manufacturers and share  
Global Humanoid Robot Bearings production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)  
Global Humanoid Robot Bearings production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)  
Global Humanoid Robot Bearings production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Humanoid Robot Bearings 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 Luoyang Hongyuan (HONB), THK, Nippon Thompson (IKO), SKF, Changzhou NRB, NSK, Haina Renhe, Shandong Bote, Ningbo Shilong (RCL), Schaeffler, 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 Humanoid Robot Bearings 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 Humanoid Robot Bearings Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Humanoid Robot Bearings Market, Segmentation by Type:

Deep Groove Ball Bearing

Four Point Contact Bearings

Angular Contact Bearing

Crossed Roller Bearing

Flexible Bearings

Others

#### Global Humanoid Robot Bearings Market, Segmentation by Robot Structure:

Neck

Waist

Arm

Leg

Dexterous Hand

Other

#### Global Humanoid Robot Bearings Market, Segmentation by Joint Application:

Linear Joints

Rotary Joints

Dexterous Hand Joints

#### Global Humanoid Robot Bearings Market, Segmentation by Application:

High-priced Humanoid Robots

Low-priced Humanoid Robots

#### Companies Profiled:

Luoyang Hongyuan (HONB)

THK

Nippon Thompson (IKO)

SKF

Changzhou NRB

NSK

Haina Renhe

Shandong Bote

Ningbo Shilong (RCL)

Schaeffler

Cixing Group

CCTY

Timken

Wanxiang Qianchao

Nachi-Fujikoshi

HIWIN

Luoyang Xinkai

XCC Group

JTEKT

Kitanihon Seiki

Changsheng Bearings (CSB)

MinebeaMitsumi

C&U

Zhejiang Qisheng

Tiejin Technology (STT)

LS Bearings

Shanghai SXD

Lyprs

**Key Questions Answered:**

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

## Contents

### 1 SUPPLY SUMMARY

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

### 2 DEMAND SUMMARY

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

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Humanoid Robot Bearings Production Value by Manufacturer (2021-2026)

- 3.2 World Humanoid Robot Bearings Production by Manufacturer (2021-2026)
- 3.3 World Humanoid Robot Bearings Average Price by Manufacturer (2021-2026)
- 3.4 Humanoid Robot Bearings Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global Humanoid Robot Bearings Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for Humanoid Robot Bearings in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for Humanoid Robot Bearings in 2025
- 3.6 Humanoid Robot Bearings Market: Overall Company Footprint Analysis
  - 3.6.1 Humanoid Robot Bearings Market: Region Footprint
  - 3.6.2 Humanoid Robot Bearings Market: Company Product Type Footprint
  - 3.6.3 Humanoid Robot Bearings 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: Humanoid Robot Bearings Production Value Comparison
  - 4.1.1 United States VS China: Humanoid Robot Bearings Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: Humanoid Robot Bearings Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Humanoid Robot Bearings Production Comparison
  - 4.2.1 United States VS China: Humanoid Robot Bearings Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Humanoid Robot Bearings Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Humanoid Robot Bearings Consumption Comparison
  - 4.3.1 United States VS China: Humanoid Robot Bearings Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: Humanoid Robot Bearings Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Humanoid Robot Bearings Manufacturers and Market Share, 2021-2026
  - 4.4.1 United States Based Humanoid Robot Bearings Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Humanoid Robot Bearings Production Value (2021-2026)

4.4.3 United States Based Manufacturers Humanoid Robot Bearings Production (2021-2026)

4.5 China Based Humanoid Robot Bearings Manufacturers and Market Share

4.5.1 China Based Humanoid Robot Bearings Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Humanoid Robot Bearings Production Value (2021-2026)

4.5.3 China Based Manufacturers Humanoid Robot Bearings Production (2021-2026)

4.6 Rest of World Based Humanoid Robot Bearings Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Humanoid Robot Bearings Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Humanoid Robot Bearings Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Humanoid Robot Bearings Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World Humanoid Robot Bearings Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Deep Groove Ball Bearing

5.2.2 Four Point Contact Bearings

5.2.3 Angular Contact Bearing

5.2.4 Crossed Roller Bearing

5.2.5 Flexible Bearings

5.2.6 Others

5.3 Market Segment by Type

5.3.1 World Humanoid Robot Bearings Production by Type (2021-2032)

5.3.2 World Humanoid Robot Bearings Production Value by Type (2021-2032)

5.3.3 World Humanoid Robot Bearings Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY ROBOT STRUCTURE**

6.1 World Humanoid Robot Bearings Market Size Overview by Robot Structure: 2021 VS 2025 VS 2032

## 6.2 Segment Introduction by Robot Structure

- 6.2.1 Neck
- 6.2.2 Waist
- 6.2.3 Arm
- 6.2.4 Leg
- 6.2.5 Dexterous Hand
- 6.2.6 Other

## 6.3 Market Segment by Robot Structure

- 6.3.1 World Humanoid Robot Bearings Production by Robot Structure (2021-2032)
- 6.3.2 World Humanoid Robot Bearings Production Value by Robot Structure (2021-2032)
- 6.3.3 World Humanoid Robot Bearings Average Price by Robot Structure (2021-2032)

## **7 MARKET ANALYSIS BY JOINT APPLICATION**

### 7.1 World Humanoid Robot Bearings Market Size Overview by Joint Application: 2021 VS 2025 VS 2032

### 7.2 Segment Introduction by Joint Application

- 7.2.1 Linear Joints
- 7.2.2 Rotary Joints
- 7.2.3 Dexterous Hand Joints

### 7.3 Market Segment by Joint Application

- 7.3.1 World Humanoid Robot Bearings Production by Joint Application (2021-2032)
- 7.3.2 World Humanoid Robot Bearings Production Value by Joint Application (2021-2032)
- 7.3.3 World Humanoid Robot Bearings Average Price by Joint Application (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

### 8.1 World Humanoid Robot Bearings Market Size Overview by Application: 2021 VS 2025 VS 2032

### 8.2 Segment Introduction by Application

- 8.2.1 High-priced Humanoid Robots
- 8.2.2 Low-priced Humanoid Robots

### 8.3 Market Segment by Application

- 8.3.1 World Humanoid Robot Bearings Production by Application (2021-2032)
- 8.3.2 World Humanoid Robot Bearings Production Value by Application (2021-2032)
- 8.3.3 World Humanoid Robot Bearings Average Price by Application (2021-2032)

## 9 COMPANY PROFILES

### 9.1 Luoyang Hongyuan (HONB)

9.1.1 Luoyang Hongyuan (HONB) Details

9.1.2 Luoyang Hongyuan (HONB) Major Business

9.1.3 Luoyang Hongyuan (HONB) Humanoid Robot Bearings Product and Services

9.1.4 Luoyang Hongyuan (HONB) Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Luoyang Hongyuan (HONB) Recent Developments/Updates

9.1.6 Luoyang Hongyuan (HONB) Competitive Strengths & Weaknesses

### 9.2 THK

9.2.1 THK Details

9.2.2 THK Major Business

9.2.3 THK Humanoid Robot Bearings Product and Services

9.2.4 THK Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 THK Recent Developments/Updates

9.2.6 THK Competitive Strengths & Weaknesses

### 9.3 Nippon Thompson (IKO)

9.3.1 Nippon Thompson (IKO) Details

9.3.2 Nippon Thompson (IKO) Major Business

9.3.3 Nippon Thompson (IKO) Humanoid Robot Bearings Product and Services

9.3.4 Nippon Thompson (IKO) Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Nippon Thompson (IKO) Recent Developments/Updates

9.3.6 Nippon Thompson (IKO) Competitive Strengths & Weaknesses

### 9.4 SKF

9.4.1 SKF Details

9.4.2 SKF Major Business

9.4.3 SKF Humanoid Robot Bearings Product and Services

9.4.4 SKF Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 SKF Recent Developments/Updates

9.4.6 SKF Competitive Strengths & Weaknesses

### 9.5 Changzhou NRB

9.5.1 Changzhou NRB Details

9.5.2 Changzhou NRB Major Business

9.5.3 Changzhou NRB Humanoid Robot Bearings Product and Services

9.5.4 Changzhou NRB Humanoid Robot Bearings Production, Price, Value, Gross

## Margin and Market Share (2021-2026)

9.5.5 Changzhou NRB Recent Developments/Updates

9.5.6 Changzhou NRB Competitive Strengths & Weaknesses

## 9.6 NSK

9.6.1 NSK Details

9.6.2 NSK Major Business

9.6.3 NSK Humanoid Robot Bearings Product and Services

9.6.4 NSK Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 NSK Recent Developments/Updates

9.6.6 NSK Competitive Strengths & Weaknesses

## 9.7 Haina Renhe

9.7.1 Haina Renhe Details

9.7.2 Haina Renhe Major Business

9.7.3 Haina Renhe Humanoid Robot Bearings Product and Services

9.7.4 Haina Renhe Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Haina Renhe Recent Developments/Updates

9.7.6 Haina Renhe Competitive Strengths & Weaknesses

## 9.8 Shandong Bote

9.8.1 Shandong Bote Details

9.8.2 Shandong Bote Major Business

9.8.3 Shandong Bote Humanoid Robot Bearings Product and Services

9.8.4 Shandong Bote Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Shandong Bote Recent Developments/Updates

9.8.6 Shandong Bote Competitive Strengths & Weaknesses

## 9.9 Ningbo Shilong (RCL)

9.9.1 Ningbo Shilong (RCL) Details

9.9.2 Ningbo Shilong (RCL) Major Business

9.9.3 Ningbo Shilong (RCL) Humanoid Robot Bearings Product and Services

9.9.4 Ningbo Shilong (RCL) Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Ningbo Shilong (RCL) Recent Developments/Updates

9.9.6 Ningbo Shilong (RCL) Competitive Strengths & Weaknesses

## 9.10 Schaeffler

9.10.1 Schaeffler Details

9.10.2 Schaeffler Major Business

9.10.3 Schaeffler Humanoid Robot Bearings Product and Services

9.10.4 Schaeffler Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Schaeffler Recent Developments/Updates

9.10.6 Schaeffler Competitive Strengths & Weaknesses

9.11 Cixing Group

9.11.1 Cixing Group Details

9.11.2 Cixing Group Major Business

9.11.3 Cixing Group Humanoid Robot Bearings Product and Services

9.11.4 Cixing Group Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Cixing Group Recent Developments/Updates

9.11.6 Cixing Group Competitive Strengths & Weaknesses

9.12 CCTY

9.12.1 CCTY Details

9.12.2 CCTY Major Business

9.12.3 CCTY Humanoid Robot Bearings Product and Services

9.12.4 CCTY Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 CCTY Recent Developments/Updates

9.12.6 CCTY Competitive Strengths & Weaknesses

9.13 Timken

9.13.1 Timken Details

9.13.2 Timken Major Business

9.13.3 Timken Humanoid Robot Bearings Product and Services

9.13.4 Timken Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Timken Recent Developments/Updates

9.13.6 Timken Competitive Strengths & Weaknesses

9.14 Wanxiang Qianchao

9.14.1 Wanxiang Qianchao Details

9.14.2 Wanxiang Qianchao Major Business

9.14.3 Wanxiang Qianchao Humanoid Robot Bearings Product and Services

9.14.4 Wanxiang Qianchao Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Wanxiang Qianchao Recent Developments/Updates

9.14.6 Wanxiang Qianchao Competitive Strengths & Weaknesses

9.15 Nachi-Fujikoshi

9.15.1 Nachi-Fujikoshi Details

9.15.2 Nachi-Fujikoshi Major Business

- 9.15.3 Nachi-Fujikoshi Humanoid Robot Bearings Product and Services
- 9.15.4 Nachi-Fujikoshi Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.15.5 Nachi-Fujikoshi Recent Developments/Updates
- 9.15.6 Nachi-Fujikoshi Competitive Strengths & Weaknesses
- 9.16 HIWIN
  - 9.16.1 HIWIN Details
  - 9.16.2 HIWIN Major Business
  - 9.16.3 HIWIN Humanoid Robot Bearings Product and Services
  - 9.16.4 HIWIN Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.16.5 HIWIN Recent Developments/Updates
  - 9.16.6 HIWIN Competitive Strengths & Weaknesses
- 9.17 Luoyang Xinkai
  - 9.17.1 Luoyang Xinkai Details
  - 9.17.2 Luoyang Xinkai Major Business
  - 9.17.3 Luoyang Xinkai Humanoid Robot Bearings Product and Services
  - 9.17.4 Luoyang Xinkai Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.17.5 Luoyang Xinkai Recent Developments/Updates
  - 9.17.6 Luoyang Xinkai Competitive Strengths & Weaknesses
- 9.18 XCC Group
  - 9.18.1 XCC Group Details
  - 9.18.2 XCC Group Major Business
  - 9.18.3 XCC Group Humanoid Robot Bearings Product and Services
  - 9.18.4 XCC Group Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.18.5 XCC Group Recent Developments/Updates
  - 9.18.6 XCC Group Competitive Strengths & Weaknesses
- 9.19 JTEKT
  - 9.19.1 JTEKT Details
  - 9.19.2 JTEKT Major Business
  - 9.19.3 JTEKT Humanoid Robot Bearings Product and Services
  - 9.19.4 JTEKT Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.19.5 JTEKT Recent Developments/Updates
  - 9.19.6 JTEKT Competitive Strengths & Weaknesses
- 9.20 Kitanihon Seiki
  - 9.20.1 Kitanihon Seiki Details

- 9.20.2 Kitanihon Seiki Major Business
- 9.20.3 Kitanihon Seiki Humanoid Robot Bearings Product and Services
- 9.20.4 Kitanihon Seiki Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.20.5 Kitanihon Seiki Recent Developments/Updates
- 9.20.6 Kitanihon Seiki Competitive Strengths & Weaknesses
- 9.21 Changsheng Bearings (CSB)
  - 9.21.1 Changsheng Bearings (CSB) Details
  - 9.21.2 Changsheng Bearings (CSB) Major Business
  - 9.21.3 Changsheng Bearings (CSB) Humanoid Robot Bearings Product and Services
  - 9.21.4 Changsheng Bearings (CSB) Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.21.5 Changsheng Bearings (CSB) Recent Developments/Updates
  - 9.21.6 Changsheng Bearings (CSB) Competitive Strengths & Weaknesses
- 9.22 MinebeaMitsumi
  - 9.22.1 MinebeaMitsumi Details
  - 9.22.2 MinebeaMitsumi Major Business
  - 9.22.3 MinebeaMitsumi Humanoid Robot Bearings Product and Services
  - 9.22.4 MinebeaMitsumi Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.22.5 MinebeaMitsumi Recent Developments/Updates
  - 9.22.6 MinebeaMitsumi Competitive Strengths & Weaknesses
- 9.23 C&U
  - 9.23.1 C&U Details
  - 9.23.2 C&U Major Business
  - 9.23.3 C&U Humanoid Robot Bearings Product and Services
  - 9.23.4 C&U Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.23.5 C&U Recent Developments/Updates
  - 9.23.6 C&U Competitive Strengths & Weaknesses
- 9.24 Zhejiang Qisheng
  - 9.24.1 Zhejiang Qisheng Details
  - 9.24.2 Zhejiang Qisheng Major Business
  - 9.24.3 Zhejiang Qisheng Humanoid Robot Bearings Product and Services
  - 9.24.4 Zhejiang Qisheng Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.24.5 Zhejiang Qisheng Recent Developments/Updates
  - 9.24.6 Zhejiang Qisheng Competitive Strengths & Weaknesses
- 9.25 Tiejin Technology (STT)

- 9.25.1 Tiejin Technology (STT) Details
- 9.25.2 Tiejin Technology (STT) Major Business
- 9.25.3 Tiejin Technology (STT) Humanoid Robot Bearings Product and Services
- 9.25.4 Tiejin Technology (STT) Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.25.5 Tiejin Technology (STT) Recent Developments/Updates
- 9.25.6 Tiejin Technology (STT) Competitive Strengths & Weaknesses
- 9.26 LS Bearings
  - 9.26.1 LS Bearings Details
  - 9.26.2 LS Bearings Major Business
  - 9.26.3 LS Bearings Humanoid Robot Bearings Product and Services
  - 9.26.4 LS Bearings Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.26.5 LS Bearings Recent Developments/Updates
  - 9.26.6 LS Bearings Competitive Strengths & Weaknesses
- 9.27 Shanghai SXD
  - 9.27.1 Shanghai SXD Details
  - 9.27.2 Shanghai SXD Major Business
  - 9.27.3 Shanghai SXD Humanoid Robot Bearings Product and Services
  - 9.27.4 Shanghai SXD Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.27.5 Shanghai SXD Recent Developments/Updates
  - 9.27.6 Shanghai SXD Competitive Strengths & Weaknesses
- 9.28 Lyprs
  - 9.28.1 Lyprs Details
  - 9.28.2 Lyprs Major Business
  - 9.28.3 Lyprs Humanoid Robot Bearings Product and Services
  - 9.28.4 Lyprs Humanoid Robot Bearings Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.28.5 Lyprs Recent Developments/Updates
  - 9.28.6 Lyprs Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

- 10.1 Humanoid Robot Bearings Industry Chain
- 10.2 Humanoid Robot Bearings Upstream Analysis
  - 10.2.1 Humanoid Robot Bearings Core Raw Materials
  - 10.2.2 Main Manufacturers of Humanoid Robot Bearings Core Raw Materials
- 10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Humanoid Robot Bearings Production Mode

10.6 Humanoid Robot Bearings Procurement Model

10.7 Humanoid Robot Bearings Industry Sales Model and Sales Channels

10.7.1 Humanoid Robot Bearings Sales Model

10.7.2 Humanoid Robot Bearings 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 Humanoid Robot Bearings Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Humanoid Robot Bearings Production Value by Region (2021-2026) & (USD Million)

Table 3. World Humanoid Robot Bearings Production Value by Region (2027-2032) & (USD Million)

Table 4. World Humanoid Robot Bearings Production Value Market Share by Region (2021-2026)

Table 5. World Humanoid Robot Bearings Production Value Market Share by Region (2027-2032)

Table 6. World Humanoid Robot Bearings Production by Region (2021-2026) & (K Units)

Table 7. World Humanoid Robot Bearings Production by Region (2027-2032) & (K Units)

Table 8. World Humanoid Robot Bearings Production Market Share by Region (2021-2026)

Table 9. World Humanoid Robot Bearings Production Market Share by Region (2027-2032)

Table 10. World Humanoid Robot Bearings Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Humanoid Robot Bearings Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Humanoid Robot Bearings Major Market Trends

Table 13. World Humanoid Robot Bearings Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Humanoid Robot Bearings Consumption by Region (2021-2026) & (K Units)

Table 15. World Humanoid Robot Bearings Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Humanoid Robot Bearings Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Humanoid Robot Bearings Producers in 2025

Table 18. World Humanoid Robot Bearings Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Humanoid Robot Bearings Producers in 2025

Table 20. World Humanoid Robot Bearings Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Humanoid Robot Bearings Company Evaluation Quadrant

Table 22. World Humanoid Robot Bearings Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Humanoid Robot Bearings Production Site of Key Manufacturer

Table 24. Humanoid Robot Bearings Market: Company Product Type Footprint

Table 25. Humanoid Robot Bearings Market: Company Product Application Footprint

Table 26. Humanoid Robot Bearings Competitive Factors

Table 27. Humanoid Robot Bearings New Entrant and Capacity Expansion Plans

Table 28. Humanoid Robot Bearings Mergers & Acquisitions Activity

Table 29. United States VS China Humanoid Robot Bearings Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Humanoid Robot Bearings Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Humanoid Robot Bearings Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Humanoid Robot Bearings Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Humanoid Robot Bearings Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Humanoid Robot Bearings Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Humanoid Robot Bearings Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Humanoid Robot Bearings Production Market Share (2021-2026)

Table 37. China Based Humanoid Robot Bearings Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Humanoid Robot Bearings Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Humanoid Robot Bearings Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Humanoid Robot Bearings Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Humanoid Robot Bearings Production Market

Share (2021-2026)

Table 42. Rest of World Based Humanoid Robot Bearings Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Humanoid Robot Bearings Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Humanoid Robot Bearings Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Humanoid Robot Bearings Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Humanoid Robot Bearings Production Market Share (2021-2026)

Table 47. World Humanoid Robot Bearings Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Humanoid Robot Bearings Production by Type (2021-2026) & (K Units)

Table 49. World Humanoid Robot Bearings Production by Type (2027-2032) & (K Units)

Table 50. World Humanoid Robot Bearings Production Value by Type (2021-2026) & (USD Million)

Table 51. World Humanoid Robot Bearings Production Value by Type (2027-2032) & (USD Million)

Table 52. World Humanoid Robot Bearings Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Humanoid Robot Bearings Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Humanoid Robot Bearings Production Value by Robot Structure, (USD Million), 2021 & 2025 & 2032

Table 55. World Humanoid Robot Bearings Production by Robot Structure (2021-2026) & (K Units)

Table 56. World Humanoid Robot Bearings Production by Robot Structure (2027-2032) & (K Units)

Table 57. World Humanoid Robot Bearings Production Value by Robot Structure (2021-2026) & (USD Million)

Table 58. World Humanoid Robot Bearings Production Value by Robot Structure (2027-2032) & (USD Million)

Table 59. World Humanoid Robot Bearings Average Price by Robot Structure (2021-2026) & (US\$/Unit)

Table 60. World Humanoid Robot Bearings Average Price by Robot Structure (2027-2032) & (US\$/Unit)

Table 61. World Humanoid Robot Bearings Production Value by Joint Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Humanoid Robot Bearings Production by Joint Application (2021-2026) & (K Units)

Table 63. World Humanoid Robot Bearings Production by Joint Application (2027-2032) & (K Units)

Table 64. World Humanoid Robot Bearings Production Value by Joint Application (2021-2026) & (USD Million)

Table 65. World Humanoid Robot Bearings Production Value by Joint Application (2027-2032) & (USD Million)

Table 66. World Humanoid Robot Bearings Average Price by Joint Application (2021-2026) & (US\$/Unit)

Table 67. World Humanoid Robot Bearings Average Price by Joint Application (2027-2032) & (US\$/Unit)

Table 68. World Humanoid Robot Bearings Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Humanoid Robot Bearings Production by Application (2021-2026) & (K Units)

Table 70. World Humanoid Robot Bearings Production by Application (2027-2032) & (K Units)

Table 71. World Humanoid Robot Bearings Production Value by Application (2021-2026) & (USD Million)

Table 72. World Humanoid Robot Bearings Production Value by Application (2027-2032) & (USD Million)

Table 73. World Humanoid Robot Bearings Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Humanoid Robot Bearings Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Luoyang Hongyuan (HONB) Basic Information, Manufacturing Base and Competitors

Table 76. Luoyang Hongyuan (HONB) Major Business

Table 77. Luoyang Hongyuan (HONB) Humanoid Robot Bearings Product and Services

Table 78. Luoyang Hongyuan (HONB) Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Luoyang Hongyuan (HONB) Recent Developments/Updates

Table 80. Luoyang Hongyuan (HONB) Competitive Strengths & Weaknesses

Table 81. THK Basic Information, Manufacturing Base and Competitors

Table 82. THK Major Business

Table 83. THK Humanoid Robot Bearings Product and Services

Table 84. THK Humanoid Robot Bearings Production (K Units), Price (US\$/Unit),

Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. THK Recent Developments/Updates

Table 86. THK Competitive Strengths & Weaknesses

Table 87. Nippon Thompson (IKO) Basic Information, Manufacturing Base and Competitors

Table 88. Nippon Thompson (IKO) Major Business

Table 89. Nippon Thompson (IKO) Humanoid Robot Bearings Product and Services

Table 90. Nippon Thompson (IKO) Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Nippon Thompson (IKO) Recent Developments/Updates

Table 92. Nippon Thompson (IKO) Competitive Strengths & Weaknesses

Table 93. SKF Basic Information, Manufacturing Base and Competitors

Table 94. SKF Major Business

Table 95. SKF Humanoid Robot Bearings Product and Services

Table 96. SKF Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. SKF Recent Developments/Updates

Table 98. SKF Competitive Strengths & Weaknesses

Table 99. Changzhou NRB Basic Information, Manufacturing Base and Competitors

Table 100. Changzhou NRB Major Business

Table 101. Changzhou NRB Humanoid Robot Bearings Product and Services

Table 102. Changzhou NRB Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Changzhou NRB Recent Developments/Updates

Table 104. Changzhou NRB Competitive Strengths & Weaknesses

Table 105. NSK Basic Information, Manufacturing Base and Competitors

Table 106. NSK Major Business

Table 107. NSK Humanoid Robot Bearings Product and Services

Table 108. NSK Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. NSK Recent Developments/Updates

Table 110. NSK Competitive Strengths & Weaknesses

Table 111. Haina Renhe Basic Information, Manufacturing Base and Competitors

Table 112. Haina Renhe Major Business

Table 113. Haina Renhe Humanoid Robot Bearings Product and Services

Table 114. Haina Renhe Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 115. Haina Renhe Recent Developments/Updates

Table 116. Haina Renhe Competitive Strengths & Weaknesses

Table 117. Shandong Bote Basic Information, Manufacturing Base and Competitors

Table 118. Shandong Bote Major Business

Table 119. Shandong Bote Humanoid Robot Bearings Product and Services

Table 120. Shandong Bote Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 121. Shandong Bote Recent Developments/Updates

Table 122. Shandong Bote Competitive Strengths & Weaknesses

Table 123. Ningbo Shilong (RCL) Basic Information, Manufacturing Base and Competitors

Table 124. Ningbo Shilong (RCL) Major Business

Table 125. Ningbo Shilong (RCL) Humanoid Robot Bearings Product and Services

Table 126. Ningbo Shilong (RCL) Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 127. Ningbo Shilong (RCL) Recent Developments/Updates

Table 128. Ningbo Shilong (RCL) Competitive Strengths & Weaknesses

Table 129. Schaeffler Basic Information, Manufacturing Base and Competitors

Table 130. Schaeffler Major Business

Table 131. Schaeffler Humanoid Robot Bearings Product and Services

Table 132. Schaeffler Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Schaeffler Recent Developments/Updates

Table 134. Schaeffler Competitive Strengths & Weaknesses

Table 135. Cixing Group Basic Information, Manufacturing Base and Competitors

Table 136. Cixing Group Major Business

Table 137. Cixing Group Humanoid Robot Bearings Product and Services

Table 138. Cixing Group Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 139. Cixing Group Recent Developments/Updates

Table 140. Cixing Group Competitive Strengths & Weaknesses

Table 141. CCTY Basic Information, Manufacturing Base and Competitors

Table 142. CCTY Major Business

Table 143. CCTY Humanoid Robot Bearings Product and Services

Table 144. CCTY Humanoid Robot Bearings Production (K Units), Price (US\$/Unit),

Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. CCTY Recent Developments/Updates

Table 146. CCTY Competitive Strengths & Weaknesses

Table 147. Timken Basic Information, Manufacturing Base and Competitors

Table 148. Timken Major Business

Table 149. Timken Humanoid Robot Bearings Product and Services

Table 150. Timken Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Timken Recent Developments/Updates

Table 152. Timken Competitive Strengths & Weaknesses

Table 153. Wanxiang Qianchao Basic Information, Manufacturing Base and Competitors

Table 154. Wanxiang Qianchao Major Business

Table 155. Wanxiang Qianchao Humanoid Robot Bearings Product and Services

Table 156. Wanxiang Qianchao Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Wanxiang Qianchao Recent Developments/Updates

Table 158. Wanxiang Qianchao Competitive Strengths & Weaknesses

Table 159. Nachi-Fujikoshi Basic Information, Manufacturing Base and Competitors

Table 160. Nachi-Fujikoshi Major Business

Table 161. Nachi-Fujikoshi Humanoid Robot Bearings Product and Services

Table 162. Nachi-Fujikoshi Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Nachi-Fujikoshi Recent Developments/Updates

Table 164. Nachi-Fujikoshi Competitive Strengths & Weaknesses

Table 165. HIWIN Basic Information, Manufacturing Base and Competitors

Table 166. HIWIN Major Business

Table 167. HIWIN Humanoid Robot Bearings Product and Services

Table 168. HIWIN Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. HIWIN Recent Developments/Updates

Table 170. HIWIN Competitive Strengths & Weaknesses

Table 171. Luoyang Xinkai Basic Information, Manufacturing Base and Competitors

Table 172. Luoyang Xinkai Major Business

Table 173. Luoyang Xinkai Humanoid Robot Bearings Product and Services

Table 174. Luoyang Xinkai Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 175. Luoyang Xinkai Recent Developments/Updates

Table 176. Luoyang Xinkai Competitive Strengths & Weaknesses

Table 177. XCC Group Basic Information, Manufacturing Base and Competitors

Table 178. XCC Group Major Business

Table 179. XCC Group Humanoid Robot Bearings Product and Services

Table 180. XCC Group Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. XCC Group Recent Developments/Updates

Table 182. XCC Group Competitive Strengths & Weaknesses

Table 183. JTEKT Basic Information, Manufacturing Base and Competitors

Table 184. JTEKT Major Business

Table 185. JTEKT Humanoid Robot Bearings Product and Services

Table 186. JTEKT Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. JTEKT Recent Developments/Updates

Table 188. JTEKT Competitive Strengths & Weaknesses

Table 189. Kitanihon Seiki Basic Information, Manufacturing Base and Competitors

Table 190. Kitanihon Seiki Major Business

Table 191. Kitanihon Seiki Humanoid Robot Bearings Product and Services

Table 192. Kitanihon Seiki Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Kitanihon Seiki Recent Developments/Updates

Table 194. Kitanihon Seiki Competitive Strengths & Weaknesses

Table 195. Changsheng Bearings (CSB) Basic Information, Manufacturing Base and Competitors

Table 196. Changsheng Bearings (CSB) Major Business

Table 197. Changsheng Bearings (CSB) Humanoid Robot Bearings Product and Services

Table 198. Changsheng Bearings (CSB) Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 199. Changsheng Bearings (CSB) Recent Developments/Updates

Table 200. Changsheng Bearings (CSB) Competitive Strengths & Weaknesses

Table 201. MinebeaMitsumi Basic Information, Manufacturing Base and Competitors

Table 202. MinebeaMitsumi Major Business

Table 203. MinebeaMitsumi Humanoid Robot Bearings Product and Services

Table 204. MinebeaMitsumi Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 205. MinebeaMitsumi Recent Developments/Updates

Table 206. MinebeaMitsumi Competitive Strengths & Weaknesses

Table 207. C&U Basic Information, Manufacturing Base and Competitors

Table 208. C&U Major Business

Table 209. C&U Humanoid Robot Bearings Product and Services

Table 210. C&U Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 211. C&U Recent Developments/Updates

Table 212. C&U Competitive Strengths & Weaknesses

Table 213. Zhejiang Qisheng Basic Information, Manufacturing Base and Competitors

Table 214. Zhejiang Qisheng Major Business

Table 215. Zhejiang Qisheng Humanoid Robot Bearings Product and Services

Table 216. Zhejiang Qisheng Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 217. Zhejiang Qisheng Recent Developments/Updates

Table 218. Zhejiang Qisheng Competitive Strengths & Weaknesses

Table 219. Tiejin Technology (STT) Basic Information, Manufacturing Base and Competitors

Table 220. Tiejin Technology (STT) Major Business

Table 221. Tiejin Technology (STT) Humanoid Robot Bearings Product and Services

Table 222. Tiejin Technology (STT) Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 223. Tiejin Technology (STT) Recent Developments/Updates

Table 224. Tiejin Technology (STT) Competitive Strengths & Weaknesses

Table 225. LS Bearings Basic Information, Manufacturing Base and Competitors

Table 226. LS Bearings Major Business

Table 227. LS Bearings Humanoid Robot Bearings Product and Services

Table 228. LS Bearings Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 229. LS Bearings Recent Developments/Updates

Table 230. LS Bearings Competitive Strengths & Weaknesses

Table 231. Shanghai SXD Basic Information, Manufacturing Base and Competitors

Table 232. Shanghai SXD Major Business

- Table 233. Shanghai SXD Humanoid Robot Bearings Product and Services
- Table 234. Shanghai SXD Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 235. Shanghai SXD Recent Developments/Updates
- Table 236. Shanghai SXD Competitive Strengths & Weaknesses
- Table 237. Lyprs Basic Information, Manufacturing Base and Competitors
- Table 238. Lyprs Major Business
- Table 239. Lyprs Humanoid Robot Bearings Product and Services
- Table 240. Lyprs Humanoid Robot Bearings Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 241. Lyprs Recent Developments/Updates
- Table 242. Lyprs Competitive Strengths & Weaknesses
- Table 243. Global Key Players of Humanoid Robot Bearings Upstream (Raw Materials)
- Table 244. Global Humanoid Robot Bearings Typical Customers
- Table 245. Humanoid Robot Bearings Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Humanoid Robot Bearings Picture

Figure 2. World Humanoid Robot Bearings Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Humanoid Robot Bearings Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Humanoid Robot Bearings Production (2021-2032) & (K Units)

Figure 5. World Humanoid Robot Bearings Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Humanoid Robot Bearings Production Value Market Share by Region (2021-2032)

Figure 7. World Humanoid Robot Bearings Production Market Share by Region (2021-2032)

Figure 8. North America Humanoid Robot Bearings Production (2021-2032) & (K Units)

Figure 9. Europe Humanoid Robot Bearings Production (2021-2032) & (K Units)

Figure 10. China Humanoid Robot Bearings Production (2021-2032) & (K Units)

Figure 11. Japan Humanoid Robot Bearings Production (2021-2032) & (K Units)

Figure 12. Humanoid Robot Bearings Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Humanoid Robot Bearings Consumption (2021-2032) & (K Units)

Figure 15. World Humanoid Robot Bearings Consumption Market Share by Region (2021-2032)

Figure 16. United States Humanoid Robot Bearings Consumption (2021-2032) & (K Units)

Figure 17. China Humanoid Robot Bearings Consumption (2021-2032) & (K Units)

Figure 18. Europe Humanoid Robot Bearings Consumption (2021-2032) & (K Units)

Figure 19. Japan Humanoid Robot Bearings Consumption (2021-2032) & (K Units)

Figure 20. South Korea Humanoid Robot Bearings Consumption (2021-2032) & (K Units)

Figure 21. ASEAN Humanoid Robot Bearings Consumption (2021-2032) & (K Units)

Figure 22. India Humanoid Robot Bearings Consumption (2021-2032) & (K Units)

Figure 23. Producer Shipments of Humanoid Robot Bearings by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Humanoid Robot Bearings Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Humanoid Robot Bearings Markets in 2025

Figure 26. United States VS China: Humanoid Robot Bearings Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Humanoid Robot Bearings Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Humanoid Robot Bearings Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Humanoid Robot Bearings Production Market Share 2025

Figure 30. China Based Manufacturers Humanoid Robot Bearings Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Humanoid Robot Bearings Production Market Share 2025

Figure 32. World Humanoid Robot Bearings Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Humanoid Robot Bearings Production Value Market Share by Type in 2025

Figure 34. Deep Groove Ball Bearing

Figure 35. Four Point Contact Bearings

Figure 36. Angular Contact Bearing

Figure 37. Crossed Roller Bearing

Figure 38. Flexible Bearings

Figure 39. Others

Figure 40. World Humanoid Robot Bearings Production Market Share by Type (2021-2032)

Figure 41. World Humanoid Robot Bearings Production Value Market Share by Type (2021-2032)

Figure 42. World Humanoid Robot Bearings Average Price by Type (2021-2032) & (US\$/Unit)

Figure 43. World Humanoid Robot Bearings Production Value by Robot Structure, (USD Million), 2021 & 2025 & 2032

Figure 44. World Humanoid Robot Bearings Production Value Market Share by Robot Structure in 2025

Figure 45. Neck

Figure 46. Waist

Figure 47. Arm

Figure 48. Leg

Figure 49. Dexterous Hand

Figure 50. Other

Figure 51. World Humanoid Robot Bearings Production Market Share by Robot

Structure (2021-2032)

Figure 52. World Humanoid Robot Bearings Production Value Market Share by Robot Structure (2021-2032)

Figure 53. World Humanoid Robot Bearings Average Price by Robot Structure (2021-2032) & (US\$/Unit)

Figure 54. World Humanoid Robot Bearings Production Value by Joint Application, (USD Million), 2021 & 2025 & 2032

Figure 55. World Humanoid Robot Bearings Production Value Market Share by Joint Application in 2025

Figure 56. Linear Joints

Figure 57. Rotary Joints

Figure 58. Dexterous Hand Joints

Figure 59. World Humanoid Robot Bearings Production Market Share by Joint Application (2021-2032)

Figure 60. World Humanoid Robot Bearings Production Value Market Share by Joint Application (2021-2032)

Figure 61. World Humanoid Robot Bearings Average Price by Joint Application (2021-2032) & (US\$/Unit)

Figure 62. World Humanoid Robot Bearings Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 63. World Humanoid Robot Bearings Production Value Market Share by Application in 2025

Figure 64. High-priced Humanoid Robots

Figure 65. Low-priced Humanoid Robots

Figure 66. World Humanoid Robot Bearings Production Market Share by Application (2021-2032)

Figure 67. World Humanoid Robot Bearings Production Value Market Share by Application (2021-2032)

Figure 68. World Humanoid Robot Bearings Average Price by Application (2021-2032) & (US\$/Unit)

Figure 69. Humanoid Robot Bearings Industry Chain

Figure 70. Humanoid Robot Bearings Procurement Model

Figure 71. Humanoid Robot Bearings Sales Model

Figure 72. Humanoid Robot Bearings Sales Channels, Direct Sales, and Distribution

Figure 73. Methodology

Figure 74. Research Process and Data Source

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