

Global Strain Wave Gearing Devices Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G3524466D442EN.html>

Date: June 2026

Pages: 185

Price: US\$ 4,480.00 (Single User License)

ID: G3524466D442EN

Abstracts

The global Strain Wave Gearing Devices market size is expected to reach \$ 2916 million by 2032, rising at a market growth of 29.1% CAGR during the forecast period (2026-2032).

In 2024, global Strain Wave Gearing Devices production reached approximately 2.45 million units, with an average global market price of around US\$ 217 per unit. A harmonic drive precision gear reducer, also known as a strain wave gear, is a precision speed reduction mechanism that utilizes the elastic deformation of a flexible (or flexspline) wheel meshing with a rigid (or circular spline) wheel and a wave generator to transmit motion and torque. Its operation principle is based on the theory of strain wave transmission, where the wave generator induces a controlled elastic deformation in the flexible wheel, creating a tooth meshing disparity that results in speed reduction and torque multiplication. Characterized by high reduction ratios, compactness, lightweight, high rotational accuracy, and quick response, harmonic drives find extensive applications in industrial robots, precision machinery, automotive, and more.

From the perspective of market size and growth drivers, the industry has entered a period of rapid expansion. The core growth engine has evolved beyond traditional industrial robotics to encompass the transformative opportunity presented by humanoid robots. Companies like Tesla and Figure AI are accelerating the transition of humanoid robots from concept to pilot production. The significant quantity of harmonic reducers required per unit constitutes the primary expectation for the market's future explosive growth.

Regarding the competitive landscape, the global market is led by the duo of Japan's HDSI and China's Leaderdrive, which collectively hold over 63% of the global revenue

market share. A notable trend, however, is the continual emergence of new domestic entrants in China. Driven by supportive policies and promising market prospects, significant capital and talent are flowing into this sector. While these new players are unlikely to challenge the top-tier incumbents in the short term, they are intensifying competition in the mid- to low-end market segments and possess the potential to reshape the future competitive dynamics through technological differentiation.

From a product trend standpoint, technological iteration is accelerating markedly. To meet the stringent demands for high power density and low inertia in emerging applications such as humanoid robots, the adoption of lightweight materials has become a critical R&D focus. Concurrently, the development of mechatronic modules remains a dominant evolutionary path. Integrating components like torque sensors to enhance system performance and simplify downstream assembly is a key strategy for manufacturers to increase product value-added.

A regional market analysis reveals diversified growth momentum. China remains the largest production and consumption market globally. However, growth hotspots in the coming years are expected to be widespread. Markets in Europe, the US, Japan, and South Korea are anticipated to see significantly accelerated growth rates, primarily fuelled by their leading positions in the research, development, and industrialization of frontier technologies such as humanoid robots and high-end medical equipment, which will spur rapid demand within local supply chains.

A comprehensive future trend assessment indicates the industry is advancing into a new phase defined by technology-driven innovation and diverse demand. The parameters of competition have broadened from a primary focus on price and precision to a comprehensive contest involving service life reliability, lightweight design, cost control, and global service capabilities. Although the humanoid robot segment carries inherent uncertainties, the vast potential it represents has already catalysed substantial capital investment and technological innovation, providing a solid foundation for the industry's long-term prosperity.

In summary, the harmonic reducer industry is at a critical juncture, marked by the convergence of traditional automation and advanced robotics. Chinese manufacturers, exemplified by Leaderdrive, have successfully ascended to the global top tier. The key to success in the next decade will hinge on a company's ability to sustain leadership in technologies like lightweight materials, while effectively capturing opportunities in evolving markets such as Europe, America, Japan, and South Korea.

This report studies the global Strain Wave Gearing Devices production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Strain Wave Gearing Devices 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 Strain Wave Gearing Devices that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Strain Wave Gearing Devices total production and demand, 2021-2032, (K Units)

Global Strain Wave Gearing Devices total production value, 2021-2032, (USD Million)

Global Strain Wave Gearing Devices production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Strain Wave Gearing Devices consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Strain Wave Gearing Devices domestic production, consumption, key domestic manufacturers and share

Global Strain Wave Gearing Devices production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Strain Wave Gearing Devices production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Strain Wave Gearing Devices production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Strain Wave Gearing Devices market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include HDSI, Leaderdrive, ILJIN Motion & Control GmbH, Zhejiang Laifual, Shenzhen Han's Motion Technology, Nidec-Shimpo, OVALO GmbH, TC Drive, Beijing CTKM Harmonic Drive, Hiwin Corporation, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Strain Wave Gearing Devices 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 Strain Wave Gearing Devices Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Strain Wave Gearing Devices Market, Segmentation by Type:

Cup Style

Hat Style

Pancake Style

Global Strain Wave Gearing Devices Market, Segmentation by Accuracy:

≤0.5 arcmin

0.5≤1 arcmin

1≤3 arcmin

Others

Global Strain Wave Gearing Devices Market, Segmentation by Sales Channel:

Direct Sales

Distribution

Global Strain Wave Gearing Devices Market, Segmentation by Application:

Industry Robot

Semiconductor Equipment

Flat Panel Equipment

Machine Tools

Optical Machine

Printing, Bookbinding and Paper Machine

Metal Working Machine

Medical Equipment

Space Equipment

Automotive

Defense Industry

Humanoid Robots

Others

Companies Profiled:

HDSI

Leaderdrive

ILJIN Motion & Control GmbH

Zhejiang Laifual

Shenzhen Han's Motion Technology

Nidec-Shimpo

OVALO GmbH

TC Drive

Beijing CTKM Harmonic Drive

Hiwin Corporation

Reach Machinery

Sichuan TLIBOT Co.,Ltd.

Ningbo Zhongda Leader Intelligent Transmission

Wanshsin Seikou

Main Drive

KHGEARS

Guangzhou Haozhi Industrial

Too Eph Transmission Technology

Guohua Intelligent Equipment

Schaeffler

BENRUN Robot

KOFON

GAM Enterprise

BHDI

SBB Tech

SPG

Jiangsu Guomao Reducer

Cone Drive

LI-MING Machinery Co., Ltd.

Key Questions Answered:

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

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