

Global Tendon-driven Robotic Hands Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Tendon-driven Robotic Hands market size was valued at US\$ 526 million in 2025 and is forecast to a readjusted size of US\$ 1882 million by 2032 with a CAGR of 19.9% during review period.

Tendon-driven robotic hands are robotic manipulators that mimic the human hand by using cables or tendons (usually made of high-strength fibers) to transmit force from motors located away from the fingers. When the motors pull the tendons, the fingers bend or extend, enabling grasping and dexterous manipulation. This design reduces weight at the hand, improves flexibility, and allows more human-like motion. In 2025, global tendon-driven robotic hand production reached approximately 60,100 units, with an average global market price of around US\$ 8,500 per unit. Annual production capacity is 79,000 units. Gross Profit Margin: 48%. The industry chain of tendon-driven robotic hands is relatively specialized and vertically integrated. Upstream, key components include precision micro-motors, high-strength tendon cables (often UHMWPE or steel), miniature bearings, sensors (force/torque, position), and control chips. These components are supplied by advanced manufacturing and electronics companies, with cost and performance heavily influenced by actuator density and sensor integration. Midstream players focus on system integration—designing dexterous hand modules, optimizing tendon routing, control algorithms, and embedded systems. Downstream demand is driven by humanoid robots, industrial automation, prosthetics, and research platforms, where requirements differ significantly in reliability, cost, and dexterity. Currently, the value concentration is shifting from hardware manufacturing toward control software and system-level integration. Tendon-driven robotic hands represent one of the most promising yet technically challenging segments in robotics.

While the current market size remains relatively small, the technology sits at the core of future humanoid and general-purpose robotic systems. In my view, the key inflection point will not be purely mechanical innovation, but the convergence of low-cost actuation, robust control algorithms, and scalable manufacturing. Companies that can significantly reduce cost while maintaining sufficient dexterity (rather than maximizing DOF) will capture the largest market share. Over the next 5–10 years, the market is likely to transition from a research-driven niche to a commercially viable component ecosystem, especially as humanoid robots move toward real-world deployment.

This report is a detailed and comprehensive analysis for global Tendon-driven Robotic Hands market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Structural Complexity and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Tendon-driven Robotic Hands market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Tendon-driven Robotic Hands market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Tendon-driven Robotic Hands market size and forecasts, by Structural Complexity and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Tendon-driven Robotic Hands market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Tendon-driven Robotic Hands

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Tendon-driven Robotic Hands market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Schunk, Festo, SMC, Zimmer, Robotiq, OnRobot A/S, Piab AB, Soft Robotics, RightHand Robotics, ABB, etc.

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

Market Segmentation

Tendon-driven Robotic Hands market is split by Structural Complexity and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Structural Complexity, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Structural Complexity

Basic Gripper Hands

Anthropomorphic Hands

Highly Dexterous Hands

Market segment by Degrees of Freedom

Low DOF Hands:2–6 DOF

Medium DOF Hands:7–15 DOF

High DOF Hands:16–25 DOF

Ultra-Dexterous Hands:25+ DOF

Market segment by Force / Grasping Capacity

Light Manipulation Hands:

Standard Manipulation Hands:5–20 N fingertip force

Heavy-Duty Robotic Hands:> 20 N fingertip force

Market segment by Application

Research / Academic

Industrial

Commercial

Others

Major players covered

Schunk

Festo

SMC

Zimmer

Robotiq

OnRobot A/S

Piab AB

Soft Robotics

RightHand Robotics

ABB

Inspire Robots

Agibot

Shadow Robot

Wonik Robotics

Tesla

Fourier Intelligence

Unitree Robotics

UBTECH Robotics Corp

Engineered Arts

Barrett Technology

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Tendon-driven Robotic Hands product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Tendon-driven Robotic Hands, with price, sales quantity, revenue, and global market share of Tendon-driven Robotic Hands from 2021 to 2026.

Chapter 3, the Tendon-driven Robotic Hands competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Tendon-driven Robotic Hands breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Structural Complexity and by Application, with sales market share and growth rate by Structural Complexity, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Tendon-driven Robotic Hands market forecast, by regions, by Structural Complexity, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Tendon-driven Robotic Hands.

Chapter 14 and 15, to describe Tendon-driven Robotic Hands sales channel, distributors, customers, research findings and conclusion.

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