

# Global Bearings in Humanoid Robots Market Growth 2026-2032

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## Abstracts

The global Bearings in Humanoid Robots market size is predicted to grow from US\$ 32.36 million in 2025 to US\$ 914 million in 2032; it is expected to grow at a CAGR of 48.3% from 2026 to 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.

Bearings in Humanoid Robots, 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 Bearings in Humanoid Robots 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 Bearings in Humanoid Robots 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.

LP Information, Inc. (LPI) ' newest research report, the 'Bearings in Humanoid Robots Industry Forecast' looks at past sales and reviews total world Bearings in Humanoid Robots sales in 2025, providing a comprehensive analysis by region and market sector of projected Bearings in Humanoid Robots sales for 2026 through 2032. With Bearings in Humanoid Robots sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Bearings in Humanoid Robots industry.

This Insight Report provides a comprehensive analysis of the global Bearings in

Humanoid Robots landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Bearings in Humanoid Robots portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Bearings in Humanoid Robots market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Bearings in Humanoid Robots and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Bearings in Humanoid Robots.

This report presents a comprehensive overview, market shares, and growth opportunities of Bearings in Humanoid Robots market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Deep Groove Ball Bearing

Four Point Contact Bearings

Angular Contact Bearing

Crossed Roller Bearing

Flexible Bearings

Others

#### Segmentation by Robot Structure:

Neck

Waist

Arm

Leg

Dexterous Hand

Other

Segmentation by Joint Application:

Linear Joints

Rotary Joints

Dexterous Hand Joint

Segmentation by Application:

High-priced Humanoid Robots

Low-priced Humanoid Robots

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered

from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report**

What is the 10-year outlook for the global Bearings in Humanoid Robots market?

What factors are driving Bearings in Humanoid Robots market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Bearings in Humanoid Robots market opportunities vary by end market size?

How does Bearings in Humanoid Robots break out by Type, by Application?

## Contents

### 1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

### 2 EXECUTIVE SUMMARY

#### 2.1 World Market Overview

- 2.1.1 Global Bearings in Humanoid Robots Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Bearings in Humanoid Robots by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Bearings in Humanoid Robots by Country/Region, 2021, 2025 & 2032

#### 2.2 Bearings in Humanoid Robots Segment by Type

- 2.2.1 Deep Groove Ball Bearing
- 2.2.2 Four Point Contact Bearings
- 2.2.3 Angular Contact Bearing
- 2.2.4 Crossed Roller Bearing
- 2.2.5 Flexible Bearings
- 2.2.6 Others
- 2.2.7 Bearings in Humanoid Robots Sales by Type
  - 2.2.7.1 Global Bearings in Humanoid Robots Sales Market Share by Type (2021-2026)
  - 2.2.7.2 Global Bearings in Humanoid Robots Revenue and Market Share by Type (2021-2026)
  - 2.2.7.3 Global Bearings in Humanoid Robots Sale Price by Type (2021-2026)

#### 2.3 Bearings in Humanoid Robots Segment by Robot Structure

- 2.3.1 Neck
- 2.3.2 Waist
- 2.3.3 Arm
- 2.3.4 Leg

2.3.5 Dexterous Hand

2.3.6 Other

2.3.7 Bearings in Humanoid Robots Sales by Robot Structure

2.3.7.1 Global Bearings in Humanoid Robots Sales Market Share by Robot Structure (2021-2026)

2.3.7.2 Global Bearings in Humanoid Robots Revenue and Market Share by Robot Structure (2021-2026)

2.3.7.3 Global Bearings in Humanoid Robots Sale Price by Robot Structure (2021-2026)

2.4 Bearings in Humanoid Robots Segment by Joint Application

2.4.1 Linear Joints

2.4.2 Rotary Joints

2.4.3 Dexterous Hand Joint

2.4.4 Bearings in Humanoid Robots Sales by Joint Application

2.4.4.1 Global Bearings in Humanoid Robots Sales Market Share by Joint Application (2021-2026)

2.4.4.2 Global Bearings in Humanoid Robots Revenue and Market Share by Joint Application (2021-2026)

2.4.4.3 Global Bearings in Humanoid Robots Sale Price by Joint Application (2021-2026)

2.5 Bearings in Humanoid Robots Segment by Application

2.5.1 High-priced Humanoid Robots

2.5.2 Low-priced Humanoid Robots

2.5.3 Bearings in Humanoid Robots Sales by Application

2.5.3.1 Global Bearings in Humanoid Robots Sale Market Share by Application (2021-2026)

2.5.3.2 Global Bearings in Humanoid Robots Revenue and Market Share by Application (2021-2026)

2.5.3.3 Global Bearings in Humanoid Robots Sale Price by Application (2021-2026)

### **3 GLOBAL BY COMPANY**

3.1 Global Bearings in Humanoid Robots Breakdown Data by Company

3.1.1 Global Bearings in Humanoid Robots Annual Sales by Company (2021-2026)

3.1.2 Global Bearings in Humanoid Robots Sales Market Share by Company (2021-2026)

3.2 Global Bearings in Humanoid Robots Annual Revenue by Company (2021-2026)

3.2.1 Global Bearings in Humanoid Robots Revenue by Company (2021-2026)

3.2.2 Global Bearings in Humanoid Robots Revenue Market Share by Company

(2021-2026)

3.3 Global Bearings in Humanoid Robots Sale Price by Company

3.4 Key Manufacturers Bearings in Humanoid Robots Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Bearings in Humanoid Robots Product Location Distribution

3.4.2 Players Bearings in Humanoid Robots Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

## **4 WORLD HISTORIC REVIEW FOR BEARINGS IN HUMANOID ROBOTS BY GEOGRAPHIC REGION**

4.1 World Historic Bearings in Humanoid Robots Market Size by Geographic Region (2021-2026)

4.1.1 Global Bearings in Humanoid Robots Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Bearings in Humanoid Robots Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Bearings in Humanoid Robots Market Size by Country/Region (2021-2026)

4.2.1 Global Bearings in Humanoid Robots Annual Sales by Country/Region (2021-2026)

4.2.2 Global Bearings in Humanoid Robots Annual Revenue by Country/Region (2021-2026)

4.3 Americas Bearings in Humanoid Robots Sales Growth

4.4 APAC Bearings in Humanoid Robots Sales Growth

4.5 Europe Bearings in Humanoid Robots Sales Growth

4.6 Middle East & Africa Bearings in Humanoid Robots Sales Growth

## **5 AMERICAS**

5.1 Americas Bearings in Humanoid Robots Sales by Country

5.1.1 Americas Bearings in Humanoid Robots Sales by Country (2021-2026)

5.1.2 Americas Bearings in Humanoid Robots Revenue by Country (2021-2026)

5.2 Americas Bearings in Humanoid Robots Sales by Type (2021-2026)

5.3 Americas Bearings in Humanoid Robots Sales by Application (2021-2026)

- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

## **6 APAC**

- 6.1 APAC Bearings in Humanoid Robots Sales by Region
  - 6.1.1 APAC Bearings in Humanoid Robots Sales by Region (2021-2026)
  - 6.1.2 APAC Bearings in Humanoid Robots Revenue by Region (2021-2026)
- 6.2 APAC Bearings in Humanoid Robots Sales by Type (2021-2026)
- 6.3 APAC Bearings in Humanoid Robots Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

## **7 EUROPE**

- 7.1 Europe Bearings in Humanoid Robots by Country
  - 7.1.1 Europe Bearings in Humanoid Robots Sales by Country (2021-2026)
  - 7.1.2 Europe Bearings in Humanoid Robots Revenue by Country (2021-2026)
- 7.2 Europe Bearings in Humanoid Robots Sales by Type (2021-2026)
- 7.3 Europe Bearings in Humanoid Robots Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

## **8 MIDDLE EAST & AFRICA**

- 8.1 Middle East & Africa Bearings in Humanoid Robots by Country
  - 8.1.1 Middle East & Africa Bearings in Humanoid Robots Sales by Country (2021-2026)
  - 8.1.2 Middle East & Africa Bearings in Humanoid Robots Revenue by Country

(2021-2026)

8.2 Middle East & Africa Bearings in Humanoid Robots Sales by Type (2021-2026)

8.3 Middle East & Africa Bearings in Humanoid Robots Sales by Application

(2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

## **9 MARKET DRIVERS, CHALLENGES AND TRENDS**

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

## **10 MANUFACTURING COST STRUCTURE ANALYSIS**

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Bearings in Humanoid Robots

10.3 Manufacturing Process Analysis of Bearings in Humanoid Robots

10.4 Industry Chain Structure of Bearings in Humanoid Robots

## **11 MARKETING, DISTRIBUTORS AND CUSTOMER**

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Bearings in Humanoid Robots Distributors

11.3 Bearings in Humanoid Robots Customer

## **12 WORLD FORECAST REVIEW FOR BEARINGS IN HUMANOID ROBOTS BY GEOGRAPHIC REGION**

12.1 Global Bearings in Humanoid Robots Market Size Forecast by Region

12.1.1 Global Bearings in Humanoid Robots Forecast by Region (2027-2032)

12.1.2 Global Bearings in Humanoid Robots Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Bearings in Humanoid Robots Forecast by Type (2027-2032)
- 12.7 Global Bearings in Humanoid Robots Forecast by Application (2027-2032)

## **13 KEY PLAYERS ANALYSIS**

### 13.1 Luoyang Hongyuan (HONB)

#### 13.1.1 Luoyang Hongyuan (HONB) Company Information

#### 13.1.2 Luoyang Hongyuan (HONB) Bearings in Humanoid Robots Product Portfolios and Specifications

#### 13.1.3 Luoyang Hongyuan (HONB) Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

#### 13.1.4 Luoyang Hongyuan (HONB) Main Business Overview

#### 13.1.5 Luoyang Hongyuan (HONB) Latest Developments

### 13.2 THK

#### 13.2.1 THK Company Information

#### 13.2.2 THK Bearings in Humanoid Robots Product Portfolios and Specifications

#### 13.2.3 THK Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

#### 13.2.4 THK Main Business Overview

#### 13.2.5 THK Latest Developments

### 13.3 Nippon Thompson (IKO)

#### 13.3.1 Nippon Thompson (IKO) Company Information

#### 13.3.2 Nippon Thompson (IKO) Bearings in Humanoid Robots Product Portfolios and Specifications

#### 13.3.3 Nippon Thompson (IKO) Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

#### 13.3.4 Nippon Thompson (IKO) Main Business Overview

#### 13.3.5 Nippon Thompson (IKO) Latest Developments

### 13.4 SKF

#### 13.4.1 SKF Company Information

#### 13.4.2 SKF Bearings in Humanoid Robots Product Portfolios and Specifications

#### 13.4.3 SKF Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

#### 13.4.4 SKF Main Business Overview

#### 13.4.5 SKF Latest Developments

### 13.5 Changzhou NRB

- 13.5.1 Changzhou NRB Company Information
- 13.5.2 Changzhou NRB Bearings in Humanoid Robots Product Portfolios and Specifications
- 13.5.3 Changzhou NRB Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.5.4 Changzhou NRB Main Business Overview
- 13.5.5 Changzhou NRB Latest Developments
- 13.6 NSK
  - 13.6.1 NSK Company Information
  - 13.6.2 NSK Bearings in Humanoid Robots Product Portfolios and Specifications
  - 13.6.3 NSK Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.6.4 NSK Main Business Overview
  - 13.6.5 NSK Latest Developments
- 13.7 Haina Renhe
  - 13.7.1 Haina Renhe Company Information
  - 13.7.2 Haina Renhe Bearings in Humanoid Robots Product Portfolios and Specifications
  - 13.7.3 Haina Renhe Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.7.4 Haina Renhe Main Business Overview
  - 13.7.5 Haina Renhe Latest Developments
- 13.8 Shandong Bote
  - 13.8.1 Shandong Bote Company Information
  - 13.8.2 Shandong Bote Bearings in Humanoid Robots Product Portfolios and Specifications
  - 13.8.3 Shandong Bote Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.8.4 Shandong Bote Main Business Overview
  - 13.8.5 Shandong Bote Latest Developments
- 13.9 Ningbo Shilong (RCL)
  - 13.9.1 Ningbo Shilong (RCL) Company Information
  - 13.9.2 Ningbo Shilong (RCL) Bearings in Humanoid Robots Product Portfolios and Specifications
  - 13.9.3 Ningbo Shilong (RCL) Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.9.4 Ningbo Shilong (RCL) Main Business Overview
  - 13.9.5 Ningbo Shilong (RCL) Latest Developments
- 13.10 Schaeffler

- 13.10.1 Schaeffler Company Information
- 13.10.2 Schaeffler Bearings in Humanoid Robots Product Portfolios and Specifications
- 13.10.3 Schaeffler Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.10.4 Schaeffler Main Business Overview
- 13.10.5 Schaeffler Latest Developments
- 13.11 Cixing Group
  - 13.11.1 Cixing Group Company Information
  - 13.11.2 Cixing Group Bearings in Humanoid Robots Product Portfolios and Specifications
  - 13.11.3 Cixing Group Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.11.4 Cixing Group Main Business Overview
  - 13.11.5 Cixing Group Latest Developments
- 13.12 CCTY
  - 13.12.1 CCTY Company Information
  - 13.12.2 CCTY Bearings in Humanoid Robots Product Portfolios and Specifications
  - 13.12.3 CCTY Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.12.4 CCTY Main Business Overview
  - 13.12.5 CCTY Latest Developments
- 13.13 Timken
  - 13.13.1 Timken Company Information
  - 13.13.2 Timken Bearings in Humanoid Robots Product Portfolios and Specifications
  - 13.13.3 Timken Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.13.4 Timken Main Business Overview
  - 13.13.5 Timken Latest Developments
- 13.14 Wanxiang Qianchao
  - 13.14.1 Wanxiang Qianchao Company Information
  - 13.14.2 Wanxiang Qianchao Bearings in Humanoid Robots Product Portfolios and Specifications
  - 13.14.3 Wanxiang Qianchao Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.14.4 Wanxiang Qianchao Main Business Overview
  - 13.14.5 Wanxiang Qianchao Latest Developments
- 13.15 Nachi-Fujikoshi
  - 13.15.1 Nachi-Fujikoshi Company Information
  - 13.15.2 Nachi-Fujikoshi Bearings in Humanoid Robots Product Portfolios and

## Specifications

13.15.3 Nachi-Fujikoshi Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Nachi-Fujikoshi Main Business Overview

13.15.5 Nachi-Fujikoshi Latest Developments

## 13.16 HIWIN

13.16.1 HIWIN Company Information

13.16.2 HIWIN Bearings in Humanoid Robots Product Portfolios and Specifications

13.16.3 HIWIN Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 HIWIN Main Business Overview

13.16.5 HIWIN Latest Developments

## 13.17 Luoyang Xinkai

13.17.1 Luoyang Xinkai Company Information

13.17.2 Luoyang Xinkai Bearings in Humanoid Robots Product Portfolios and

## Specifications

13.17.3 Luoyang Xinkai Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Luoyang Xinkai Main Business Overview

13.17.5 Luoyang Xinkai Latest Developments

## 13.18 XCC Group

13.18.1 XCC Group Company Information

13.18.2 XCC Group Bearings in Humanoid Robots Product Portfolios and

## Specifications

13.18.3 XCC Group Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 XCC Group Main Business Overview

13.18.5 XCC Group Latest Developments

## 13.19 JTEKT

13.19.1 JTEKT Company Information

13.19.2 JTEKT Bearings in Humanoid Robots Product Portfolios and Specifications

13.19.3 JTEKT Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 JTEKT Main Business Overview

13.19.5 JTEKT Latest Developments

## 13.20 Kitanihon Seiki

13.20.1 Kitanihon Seiki Company Information

13.20.2 Kitanihon Seiki Bearings in Humanoid Robots Product Portfolios and Specifications

13.20.3 Kitanihon Seiki Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Kitanihon Seiki Main Business Overview

13.20.5 Kitanihon Seiki Latest Developments

13.21 Changsheng Bearings (CSB)

13.21.1 Changsheng Bearings (CSB) Company Information

13.21.2 Changsheng Bearings (CSB) Bearings in Humanoid Robots Product Portfolios and Specifications

13.21.3 Changsheng Bearings (CSB) Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 Changsheng Bearings (CSB) Main Business Overview

13.21.5 Changsheng Bearings (CSB) Latest Developments

13.22 MinebeaMitsumi

13.22.1 MinebeaMitsumi Company Information

13.22.2 MinebeaMitsumi Bearings in Humanoid Robots Product Portfolios and Specifications

13.22.3 MinebeaMitsumi Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 MinebeaMitsumi Main Business Overview

13.22.5 MinebeaMitsumi Latest Developments

13.23 C&U

13.23.1 C&U Company Information

13.23.2 C&U Bearings in Humanoid Robots Product Portfolios and Specifications

13.23.3 C&U Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 C&U Main Business Overview

13.23.5 C&U Latest Developments

13.24 Zhejiang Qisheng

13.24.1 Zhejiang Qisheng Company Information

13.24.2 Zhejiang Qisheng Bearings in Humanoid Robots Product Portfolios and Specifications

13.24.3 Zhejiang Qisheng Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 Zhejiang Qisheng Main Business Overview

13.24.5 Zhejiang Qisheng Latest Developments

13.25 Tiejin Technology (STT)

13.25.1 Tiejin Technology (STT) Company Information

13.25.2 Tiejin Technology (STT) Bearings in Humanoid Robots Product Portfolios and Specifications

13.25.3 Tiejin Technology (STT) Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.25.4 Tiejin Technology (STT) Main Business Overview

13.25.5 Tiejin Technology (STT) Latest Developments

13.26 LS Bearings

13.26.1 LS Bearings Company Information

13.26.2 LS Bearings Bearings in Humanoid Robots Product Portfolios and Specifications

13.26.3 LS Bearings Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.26.4 LS Bearings Main Business Overview

13.26.5 LS Bearings Latest Developments

13.27 Shanghai SXD

13.27.1 Shanghai SXD Company Information

13.27.2 Shanghai SXD Bearings in Humanoid Robots Product Portfolios and Specifications

13.27.3 Shanghai SXD Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.27.4 Shanghai SXD Main Business Overview

13.27.5 Shanghai SXD Latest Developments

13.28 Lyprs

13.28.1 Lyprs Company Information

13.28.2 Lyprs Bearings in Humanoid Robots Product Portfolios and Specifications

13.28.3 Lyprs Bearings in Humanoid Robots Sales, Revenue, Price and Gross Margin (2021-2026)

13.28.4 Lyprs Main Business Overview

13.28.5 Lyprs Latest Developments

## **14 RESEARCH FINDINGS AND CONCLUSION**

## List Of Tables

### LIST OF TABLES

Table 1. Bearings in Humanoid Robots Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Bearings in Humanoid Robots Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Deep Groove Ball Bearing

Table 4. Major Players of Four Point Contact Bearings

Table 5. Major Players of Angular Contact Bearing

Table 6. Major Players of Crossed Roller Bearing

Table 7. Major Players of Flexible Bearings

Table 8. Major Players of Others

Table 9. Global Bearings in Humanoid Robots Sales by Type (2021-2026) & (K Units)

Table 10. Global Bearings in Humanoid Robots Sales Market Share by Type (2021-2026)

Table 11. Global Bearings in Humanoid Robots Revenue by Type (2021-2026) & (\$ million)

Table 12. Global Bearings in Humanoid Robots Revenue Market Share by Type (2021-2026)

Table 13. Global Bearings in Humanoid Robots Sale Price by Type (2021-2026) & (US\$/Unit)

Table 14. Major Players of Neck

Table 15. Major Players of Waist

Table 16. Major Players of Arm

Table 17. Major Players of Leg

Table 18. Major Players of Dexterous Hand

Table 19. Major Players of Other

Table 20. Global Bearings in Humanoid Robots Sales by Robot Structure (2021-2026) & (K Units)

Table 21. Global Bearings in Humanoid Robots Sales Market Share by Robot Structure (2021-2026)

Table 22. Global Bearings in Humanoid Robots Revenue by Robot Structure (2021-2026) & (\$ million)

Table 23. Global Bearings in Humanoid Robots Revenue Market Share by Robot Structure (2021-2026)

Table 24. Global Bearings in Humanoid Robots Sale Price by Robot Structure (2021-2026) & (US\$/Unit)

Table 25. Major Players of Linear Joints

Table 26. Major Players of Rotary Joints

Table 27. Major Players of Dexterous Hand Joint

Table 28. Global Bearings in Humanoid Robots Sales by Joint Application (2021-2026) & (K Units)

Table 29. Global Bearings in Humanoid Robots Sales Market Share by Joint Application (2021-2026)

Table 30. Global Bearings in Humanoid Robots Revenue by Joint Application (2021-2026) & (\$ million)

Table 31. Global Bearings in Humanoid Robots Revenue Market Share by Joint Application (2021-2026)

Table 32. Global Bearings in Humanoid Robots Sale Price by Joint Application (2021-2026) & (US\$/Unit)

Table 33. Global Bearings in Humanoid Robots Sale by Application (2021-2026) & (K Units)

Table 34. Global Bearings in Humanoid Robots Sale Market Share by Application (2021-2026)

Table 35. Global Bearings in Humanoid Robots Revenue by Application (2021-2026) & (\$ million)

Table 36. Global Bearings in Humanoid Robots Revenue Market Share by Application (2021-2026)

Table 37. Global Bearings in Humanoid Robots Sale Price by Application (2021-2026) & (US\$/Unit)

Table 38. Global Bearings in Humanoid Robots Sales by Company (2021-2026) & (K Units)

Table 39. Global Bearings in Humanoid Robots Sales Market Share by Company (2021-2026)

Table 40. Global Bearings in Humanoid Robots Revenue by Company (2021-2026) & (\$ millions)

Table 41. Global Bearings in Humanoid Robots Revenue Market Share by Company (2021-2026)

Table 42. Global Bearings in Humanoid Robots Sale Price by Company (2021-2026) & (US\$/Unit)

Table 43. Key Manufacturers Bearings in Humanoid Robots Producing Area Distribution and Sales Area

Table 44. Players Bearings in Humanoid Robots Products Offered

Table 45. Bearings in Humanoid Robots Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 46. New Products and Potential Entrants

Table 47. Market M&A Activity & Strategy

Table 48. Global Bearings in Humanoid Robots Sales by Geographic Region (2021-2026) & (K Units)

Table 49. Global Bearings in Humanoid Robots Sales Market Share Geographic Region (2021-2026)

Table 50. Global Bearings in Humanoid Robots Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 51. Global Bearings in Humanoid Robots Revenue Market Share by Geographic Region (2021-2026)

Table 52. Global Bearings in Humanoid Robots Sales by Country/Region (2021-2026) & (K Units)

Table 53. Global Bearings in Humanoid Robots Sales Market Share by Country/Region (2021-2026)

Table 54. Global Bearings in Humanoid Robots Revenue by Country/Region (2021-2026) & (\$ millions)

Table 55. Global Bearings in Humanoid Robots Revenue Market Share by Country/Region (2021-2026)

Table 56. Americas Bearings in Humanoid Robots Sales by Country (2021-2026) & (K Units)

Table 57. Americas Bearings in Humanoid Robots Sales Market Share by Country (2021-2026)

Table 58. Americas Bearings in Humanoid Robots Revenue by Country (2021-2026) & (\$ millions)

Table 59. Americas Bearings in Humanoid Robots Sales by Type (2021-2026) & (K Units)

Table 60. Americas Bearings in Humanoid Robots Sales by Application (2021-2026) & (K Units)

Table 61. APAC Bearings in Humanoid Robots Sales by Region (2021-2026) & (K Units)

Table 62. APAC Bearings in Humanoid Robots Sales Market Share by Region (2021-2026)

Table 63. APAC Bearings in Humanoid Robots Revenue by Region (2021-2026) & (\$ millions)

Table 64. APAC Bearings in Humanoid Robots Sales by Type (2021-2026) & (K Units)

Table 65. APAC Bearings in Humanoid Robots Sales by Application (2021-2026) & (K Units)

Table 66. Europe Bearings in Humanoid Robots Sales by Country (2021-2026) & (K Units)

Table 67. Europe Bearings in Humanoid Robots Revenue by Country (2021-2026) & (\$

millions)

Table 68. Europe Bearings in Humanoid Robots Sales by Type (2021-2026) & (K Units)

Table 69. Europe Bearings in Humanoid Robots Sales by Application (2021-2026) & (K Units)

Table 70. Middle East & Africa Bearings in Humanoid Robots Sales by Country (2021-2026) & (K Units)

Table 71. Middle East & Africa Bearings in Humanoid Robots Revenue Market Share by Country (2021-2026)

Table 72. Middle East & Africa Bearings in Humanoid Robots Sales by Type (2021-2026) & (K Units)

Table 73. Middle East & Africa Bearings in Humanoid Robots Sales by Application (2021-2026) & (K Units)

Table 74. Key Market Drivers & Growth Opportunities of Bearings in Humanoid Robots

Table 75. Key Market Challenges & Risks of Bearings in Humanoid Robots

Table 76. Key Industry Trends of Bearings in Humanoid Robots

Table 77. Bearings in Humanoid Robots Raw Material

Table 78. Key Suppliers of Raw Materials

Table 79. Bearings in Humanoid Robots Distributors List

Table 80. Bearings in Humanoid Robots Customer List

Table 81. Global Bearings in Humanoid Robots Sales Forecast by Region (2027-2032) & (K Units)

Table 82. Global Bearings in Humanoid Robots Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 83. Americas Bearings in Humanoid Robots Sales Forecast by Country (2027-2032) & (K Units)

Table 84. Americas Bearings in Humanoid Robots Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. APAC Bearings in Humanoid Robots Sales Forecast by Region (2027-2032) & (K Units)

Table 86. APAC Bearings in Humanoid Robots Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 87. Europe Bearings in Humanoid Robots Sales Forecast by Country (2027-2032) & (K Units)

Table 88. Europe Bearings in Humanoid Robots Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 89. Middle East & Africa Bearings in Humanoid Robots Sales Forecast by Country (2027-2032) & (K Units)

Table 90. Middle East & Africa Bearings in Humanoid Robots Revenue Forecast by Country (2027-2032) & (\$ millions)

- Table 91. Global Bearings in Humanoid Robots Sales Forecast by Type (2027-2032) & (K Units)
- Table 92. Global Bearings in Humanoid Robots Revenue Forecast by Type (2027-2032) & (\$ millions)
- Table 93. Global Bearings in Humanoid Robots Sales Forecast by Application (2027-2032) & (K Units)
- Table 94. Global Bearings in Humanoid Robots Revenue Forecast by Application (2027-2032) & (\$ millions)
- Table 95. Luoyang Hongyuan (HONB) Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors
- Table 96. Luoyang Hongyuan (HONB) Bearings in Humanoid Robots Product Portfolios and Specifications
- Table 97. Luoyang Hongyuan (HONB) Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
- Table 98. Luoyang Hongyuan (HONB) Main Business
- Table 99. Luoyang Hongyuan (HONB) Latest Developments
- Table 100. THK Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors
- Table 101. THK Bearings in Humanoid Robots Product Portfolios and Specifications
- Table 102. THK Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
- Table 103. THK Main Business
- Table 104. THK Latest Developments
- Table 105. Nippon Thompson (IKO) Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors
- Table 106. Nippon Thompson (IKO) Bearings in Humanoid Robots Product Portfolios and Specifications
- Table 107. Nippon Thompson (IKO) Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
- Table 108. Nippon Thompson (IKO) Main Business
- Table 109. Nippon Thompson (IKO) Latest Developments
- Table 110. SKF Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors
- Table 111. SKF Bearings in Humanoid Robots Product Portfolios and Specifications
- Table 112. SKF Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
- Table 113. SKF Main Business
- Table 114. SKF Latest Developments
- Table 115. Changzhou NRB Basic Information, Bearings in Humanoid Robots

Manufacturing Base, Sales Area and Its Competitors

Table 116. Changzhou NRB Bearings in Humanoid Robots Product Portfolios and Specifications

Table 117. Changzhou NRB Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 118. Changzhou NRB Main Business

Table 119. Changzhou NRB Latest Developments

Table 120. NSK Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 121. NSK Bearings in Humanoid Robots Product Portfolios and Specifications

Table 122. NSK Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 123. NSK Main Business

Table 124. NSK Latest Developments

Table 125. Haina Renhe Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 126. Haina Renhe Bearings in Humanoid Robots Product Portfolios and Specifications

Table 127. Haina Renhe Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 128. Haina Renhe Main Business

Table 129. Haina Renhe Latest Developments

Table 130. Shandong Bote Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 131. Shandong Bote Bearings in Humanoid Robots Product Portfolios and Specifications

Table 132. Shandong Bote Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 133. Shandong Bote Main Business

Table 134. Shandong Bote Latest Developments

Table 135. Ningbo Shilong (RCL) Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 136. Ningbo Shilong (RCL) Bearings in Humanoid Robots Product Portfolios and Specifications

Table 137. Ningbo Shilong (RCL) Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 138. Ningbo Shilong (RCL) Main Business

Table 139. Ningbo Shilong (RCL) Latest Developments

Table 140. Schaeffler Basic Information, Bearings in Humanoid Robots Manufacturing

Base, Sales Area and Its Competitors

Table 141. Schaeffler Bearings in Humanoid Robots Product Portfolios and Specifications

Table 142. Schaeffler Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 143. Schaeffler Main Business

Table 144. Schaeffler Latest Developments

Table 145. Cixing Group Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 146. Cixing Group Bearings in Humanoid Robots Product Portfolios and Specifications

Table 147. Cixing Group Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 148. Cixing Group Main Business

Table 149. Cixing Group Latest Developments

Table 150. CCTY Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 151. CCTY Bearings in Humanoid Robots Product Portfolios and Specifications

Table 152. CCTY Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 153. CCTY Main Business

Table 154. CCTY Latest Developments

Table 155. Timken Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 156. Timken Bearings in Humanoid Robots Product Portfolios and Specifications

Table 157. Timken Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 158. Timken Main Business

Table 159. Timken Latest Developments

Table 160. Wanxiang Qianchao Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 161. Wanxiang Qianchao Bearings in Humanoid Robots Product Portfolios and Specifications

Table 162. Wanxiang Qianchao Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 163. Wanxiang Qianchao Main Business

Table 164. Wanxiang Qianchao Latest Developments

Table 165. Nachi-Fujikoshi Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 166. Nachi-Fujikoshi Bearings in Humanoid Robots Product Portfolios and Specifications

Table 167. Nachi-Fujikoshi Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 168. Nachi-Fujikoshi Main Business

Table 169. Nachi-Fujikoshi Latest Developments

Table 170. HIWIN Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 171. HIWIN Bearings in Humanoid Robots Product Portfolios and Specifications

Table 172. HIWIN Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 173. HIWIN Main Business

Table 174. HIWIN Latest Developments

Table 175. Luoyang Xinkai Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 176. Luoyang Xinkai Bearings in Humanoid Robots Product Portfolios and Specifications

Table 177. Luoyang Xinkai Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 178. Luoyang Xinkai Main Business

Table 179. Luoyang Xinkai Latest Developments

Table 180. XCC Group Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 181. XCC Group Bearings in Humanoid Robots Product Portfolios and Specifications

Table 182. XCC Group Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 183. XCC Group Main Business

Table 184. XCC Group Latest Developments

Table 185. JTEKT Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 186. JTEKT Bearings in Humanoid Robots Product Portfolios and Specifications

Table 187. JTEKT Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 188. JTEKT Main Business

Table 189. JTEKT Latest Developments

Table 190. Kitanihon Seiki Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 191. Kitanihon Seiki Bearings in Humanoid Robots Product Portfolios and

## Specifications

Table 192. Kitanihon Seiki Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 193. Kitanihon Seiki Main Business

Table 194. Kitanihon Seiki Latest Developments

Table 195. Changsheng Bearings (CSB) Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 196. Changsheng Bearings (CSB) Bearings in Humanoid Robots Product Portfolios and Specifications

Table 197. Changsheng Bearings (CSB) Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 198. Changsheng Bearings (CSB) Main Business

Table 199. Changsheng Bearings (CSB) Latest Developments

Table 200. MinebeaMitsumi Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 201. MinebeaMitsumi Bearings in Humanoid Robots Product Portfolios and Specifications

Table 202. MinebeaMitsumi Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 203. MinebeaMitsumi Main Business

Table 204. MinebeaMitsumi Latest Developments

Table 205. C&U Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 206. C&U Bearings in Humanoid Robots Product Portfolios and Specifications

Table 207. C&U Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 208. C&U Main Business

Table 209. C&U Latest Developments

Table 210. Zhejiang Qisheng Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 211. Zhejiang Qisheng Bearings in Humanoid Robots Product Portfolios and Specifications

Table 212. Zhejiang Qisheng Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 213. Zhejiang Qisheng Main Business

Table 214. Zhejiang Qisheng Latest Developments

Table 215. Tiejin Technology (STT) Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 216. Tiejin Technology (STT) Bearings in Humanoid Robots Product Portfolios

and Specifications

Table 217. Tiejin Technology (STT) Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 218. Tiejin Technology (STT) Main Business

Table 219. Tiejin Technology (STT) Latest Developments

Table 220. LS Bearings Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 221. LS Bearings Bearings in Humanoid Robots Product Portfolios and Specifications

Table 222. LS Bearings Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 223. LS Bearings Main Business

Table 224. LS Bearings Latest Developments

Table 225. Shanghai SXD Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 226. Shanghai SXD Bearings in Humanoid Robots Product Portfolios and Specifications

Table 227. Shanghai SXD Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 228. Shanghai SXD Main Business

Table 229. Shanghai SXD Latest Developments

Table 230. Lyprs Basic Information, Bearings in Humanoid Robots Manufacturing Base, Sales Area and Its Competitors

Table 231. Lyprs Bearings in Humanoid Robots Product Portfolios and Specifications

Table 232. Lyprs Bearings in Humanoid Robots Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 233. Lyprs Main Business

Table 234. Lyprs Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of Bearings in Humanoid Robots
- Figure 2. Bearings in Humanoid Robots Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Bearings in Humanoid Robots Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global Bearings in Humanoid Robots Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Bearings in Humanoid Robots Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Bearings in Humanoid Robots Sales Market Share by Country/Region (2025)
- Figure 10. Bearings in Humanoid Robots Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Deep Groove Ball Bearing
- Figure 12. Product Picture of Four Point Contact Bearings
- Figure 13. Product Picture of Angular Contact Bearing
- Figure 14. Product Picture of Crossed Roller Bearing
- Figure 15. Product Picture of Flexible Bearings
- Figure 16. Product Picture of Others
- Figure 17. Global Bearings in Humanoid Robots Sales Market Share by Type in 2026
- Figure 18. Global Bearings in Humanoid Robots Revenue Market Share by Type (2021-2026)
- Figure 19. Product Picture of Neck
- Figure 20. Product Picture of Waist
- Figure 21. Product Picture of Arm
- Figure 22. Product Picture of Leg
- Figure 23. Product Picture of Dexterous Hand
- Figure 24. Product Picture of Other
- Figure 25. Global Bearings in Humanoid Robots Sales Market Share by Robot Structure in 2026
- Figure 26. Global Bearings in Humanoid Robots Revenue Market Share by Robot Structure (2021-2026)
- Figure 27. Product Picture of Linear Joints
- Figure 28. Product Picture of Rotary Joints
- Figure 29. Product Picture of Dexterous Hand Joint

- Figure 30. Global Bearings in Humanoid Robots Sales Market Share by Joint Application in 2026
- Figure 31. Global Bearings in Humanoid Robots Revenue Market Share by Joint Application (2021-2026)
- Figure 32. Bearings in Humanoid Robots Consumed in High-priced Humanoid Robots
- Figure 33. Global Bearings in Humanoid Robots Market: High-priced Humanoid Robots (2021-2026) & (K Units)
- Figure 34. Bearings in Humanoid Robots Consumed in Low-priced Humanoid Robots
- Figure 35. Global Bearings in Humanoid Robots Market: Low-priced Humanoid Robots (2021-2026) & (K Units)
- Figure 36. Global Bearings in Humanoid Robots Sale Market Share by Application (2025)
- Figure 37. Global Bearings in Humanoid Robots Revenue Market Share by Application in 2025
- Figure 38. Bearings in Humanoid Robots Sales by Company in 2025 (K Units)
- Figure 39. Global Bearings in Humanoid Robots Sales Market Share by Company in 2025
- Figure 40. Bearings in Humanoid Robots Revenue by Company in 2025 (\$ millions)
- Figure 41. Global Bearings in Humanoid Robots Revenue Market Share by Company in 2025
- Figure 42. Global Bearings in Humanoid Robots Sales Market Share by Geographic Region (2021-2026)
- Figure 43. Global Bearings in Humanoid Robots Revenue Market Share by Geographic Region in 2025
- Figure 44. Americas Bearings in Humanoid Robots Sales 2021-2026 (K Units)
- Figure 45. Americas Bearings in Humanoid Robots Revenue 2021-2026 (\$ millions)
- Figure 46. APAC Bearings in Humanoid Robots Sales 2021-2026 (K Units)
- Figure 47. APAC Bearings in Humanoid Robots Revenue 2021-2026 (\$ millions)
- Figure 48. Europe Bearings in Humanoid Robots Sales 2021-2026 (K Units)
- Figure 49. Europe Bearings in Humanoid Robots Revenue 2021-2026 (\$ millions)
- Figure 50. Middle East & Africa Bearings in Humanoid Robots Sales 2021-2026 (K Units)
- Figure 51. Middle East & Africa Bearings in Humanoid Robots Revenue 2021-2026 (\$ millions)
- Figure 52. Americas Bearings in Humanoid Robots Sales Market Share by Country in 2025
- Figure 53. Americas Bearings in Humanoid Robots Revenue Market Share by Country (2021-2026)
- Figure 54. Americas Bearings in Humanoid Robots Sales Market Share by Type

(2021-2026)

Figure 55. Americas Bearings in Humanoid Robots Sales Market Share by Application (2021-2026)

Figure 56. United States Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 57. Canada Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 58. Mexico Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 59. Brazil Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 60. APAC Bearings in Humanoid Robots Sales Market Share by Region in 2025

Figure 61. APAC Bearings in Humanoid Robots Revenue Market Share by Region (2021-2026)

Figure 62. APAC Bearings in Humanoid Robots Sales Market Share by Type (2021-2026)

Figure 63. APAC Bearings in Humanoid Robots Sales Market Share by Application (2021-2026)

Figure 64. China Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 65. Japan Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 66. South Korea Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 67. Southeast Asia Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 68. India Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 69. Australia Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 70. China Taiwan Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 71. Europe Bearings in Humanoid Robots Sales Market Share by Country in 2025

Figure 72. Europe Bearings in Humanoid Robots Revenue Market Share by Country (2021-2026)

Figure 73. Europe Bearings in Humanoid Robots Sales Market Share by Type (2021-2026)

Figure 74. Europe Bearings in Humanoid Robots Sales Market Share by Application (2021-2026)

Figure 75. Germany Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 76. France Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 77. UK Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 78. Italy Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 79. Russia Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 80. Middle East & Africa Bearings in Humanoid Robots Sales Market Share by Country (2021-2026)

Figure 81. Middle East & Africa Bearings in Humanoid Robots Sales Market Share by Type (2021-2026)

Figure 82. Middle East & Africa Bearings in Humanoid Robots Sales Market Share by Application (2021-2026)

Figure 83. Egypt Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 84. South Africa Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 85. Israel Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 86. Turkey Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 87. GCC Countries Bearings in Humanoid Robots Revenue Growth 2021-2026 (\$ millions)

Figure 88. Manufacturing Cost Structure Analysis of Bearings in Humanoid Robots in 2026

Figure 89. Manufacturing Process Analysis of Bearings in Humanoid Robots

Figure 90. Industry Chain Structure of Bearings in Humanoid Robots

Figure 91. Channels of Distribution

Figure 92. Global Bearings in Humanoid Robots Sales Market Forecast by Region (2027-2032)

Figure 93. Global Bearings in Humanoid Robots Revenue Market Share Forecast by Region (2027-2032)

Figure 94. Global Bearings in Humanoid Robots Sales Market Share Forecast by Type (2027-2032)

Figure 95. Global Bearings in Humanoid Robots Revenue Market Share Forecast by Type (2027-2032)

Figure 96. Global Bearings in Humanoid Robots Sales Market Share Forecast by Application (2027-2032)

Figure 97. Global Bearings in Humanoid Robots Revenue Market Share Forecast by Application (2027-2032)

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