

Global Flexspline for Harmonic Drive Market Growth 2026-2032

<https://marketpublishers.com/r/GE295991B34BEN.html>

Date: July 2026

Pages: 122

Price: US\$ 3,660.00 (Single User License)

ID: GE295991B34BEN

Abstracts

The global Flexspline for Harmonic Drive market size is predicted to grow from US\$ 106 million in 2025 to US\$ 250 million in 2032; it is expected to grow at a CAGR of 13.0% from 2026 to 2032.

Flexspline for harmonic drive is the core elastic thin wall external gear component used in harmonic transmission systems for high precision reduction and motion control applications in industrial robots, humanoid robots, collaborative robots, semiconductor equipment, medical systems and advanced automation machinery. The research scope mainly covers cup type, hat type and flanged flexspline products manufactured with high strength alloy steel, stainless steel and specialized heat treated metallic materials. Core manufacturing technologies include ultra thin wall precision forming, gear profile machining, heat treatment, fatigue life optimization and high consistency precision assembly. Key specifications generally include module, tooth count, torque class, radial deformation capability, concentricity and cyclic fatigue life. The primary function of the product is to achieve periodic meshing with the circular spline through controlled elastic deformation, enabling high reduction ratio, high positioning accuracy, low backlash and lightweight transmission performance. Flexsplines are widely deployed in robotic joint modules, servo actuators and precision motion control systems. In 2025, the global average selling price of flexspline products is estimated at approximately USD 50 to USD 120 per unit, while the flexspline value typically accounts for approximately 18 percent to 25 percent of the total harmonic drive system value. Industry gross margin is estimated at approximately 35 percent to 55 percent, consistent with the current precision transmission market for robotics applications.

The flexspline industry for harmonic drives is evolving from a traditional industrial robot component market into a core precision transmission segment driven by humanoid

robots and advanced intelligent equipment. Upstream supply mainly includes high strength alloy steel, heat treatment materials, precision machining equipment and cutting tools, while midstream manufacturing focuses on precision forming, fatigue life control and high consistency processing. Downstream demand covers industrial robots, collaborative robots, humanoid robots, semiconductor equipment and medical automation systems. As robotics systems require lighter weight, higher precision and greater degrees of freedom, flexspline products are continuously advancing toward thinner wall structures, compact dimensions, higher torque density and longer service life, leading to increasing technical barriers and qualification requirements across the industry.

The global supply landscape remains highly concentrated in Asia. Japanese manufacturers continue to dominate the high end market, while Chinese suppliers are rapidly expanding their market presence through localization trends, robotics capacity expansion and intelligent manufacturing investment. Industry capital expenditure has increased significantly in recent years, with more companies investing in automated heat treatment systems, integrated machining processes and digital inspection platforms to improve production consistency and fatigue durability. At the same time, growing demand from new energy equipment, lithium battery production systems and semiconductor automation is further expanding the application scope of flexspline products.

The industry is expected to maintain strong long term growth momentum over the coming years, although market differentiation will continue to intensify. High end applications are likely to remain concentrated among companies with strong technical accumulation and large scale validation capability, while lower end segments may face increasing pricing pressure. The commercialization pace of humanoid robots is expected to become one of the most important drivers of future demand, especially for lightweight, miniature and high durability flexspline products. As robotic systems continue to require more joints and higher precision motion control capability, the strategic importance of flexsplines within harmonic drive systems is expected to increase further.

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

Drive industry.

This Insight Report provides a comprehensive analysis of the global Flexspline for Harmonic Drive 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 Flexspline for Harmonic Drive portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Flexspline for Harmonic Drive market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Flexspline for Harmonic Drive and breaks down the forecast by Product Structure, 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 Flexspline for Harmonic Drive.

This report presents a comprehensive overview, market shares, and growth opportunities of Flexspline for Harmonic Drive market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Structure:

Cup Type Flexspline

Hat Type Flexspline

Flanged Flexspline

Others

Segmentation by Torque Class:

Low Torque Flexspline (300 Nm)

Others

Segmentation by Precision Grade:

Standard Precision Flexspline (Backlash 3?10 arcmin)

High Precision Flexspline (Backlash 1?3 arcmin)

Ultra Precision Flexspline (Backlash

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 Flexspline for Harmonic Drive Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Flexspline for Harmonic Drive by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Flexspline for Harmonic Drive by Country/Region, 2021, 2025 & 2032
- 2.2 Flexspline for Harmonic Drive Segment by Product Structure
 - 2.2.1 Cup Type Flexspline
 - 2.2.2 Hat Type Flexspline
 - 2.2.3 Flanged Flexspline
 - 2.2.4 Others
 - 2.2.5 Flexspline for Harmonic Drive Sales by Product Structure
 - 2.2.5.1 Global Flexspline for Harmonic Drive Sales Market Share by Product Structure (2021-2026)
 - 2.2.5.2 Global Flexspline for Harmonic Drive Revenue and Market Share by Product Structure (2021-2026)
 - 2.2.5.3 Global Flexspline for Harmonic Drive Sale Price by Product Structure (2021-2026)
- 2.3 Flexspline for Harmonic Drive Segment by Torque Class
 - 2.3.1 Low Torque Flexspline (300 Nm)
 - 2.3.5 Others
 - 2.3.6 Flexspline for Harmonic Drive Sales by Torque Class
 - 2.3.6.1 Global Flexspline for Harmonic Drive Sales Market Share by Torque Class (2021-2026)

2.3.6.2 Global Flexspline for Harmonic Drive Revenue and Market Share by Torque Class (2021-2026)

2.3.6.3 Global Flexspline for Harmonic Drive Sale Price by Torque Class (2021-2026)

2.4 Flexspline for Harmonic Drive Segment by Precision Grade

2.4.1 Standard Precision Flexspline (Backlash 3?10 arcmin)

2.4.2 High Precision Flexspline (Backlash 1?3 arcmin)

2.4.3 Ultra Precision Flexspline (Backlash

List Of Tables

LIST OF TABLES

Table 1. Flexspline for Harmonic Drive Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Flexspline for Harmonic Drive Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Cup Type Flexspline

Table 4. Major Players of Hat Type Flexspline

Table 5. Major Players of Flanged Flexspline

Table 6. Major Players of Others

Table 7. Global Flexspline for Harmonic Drive Sales by Product Structure (2021-2026) & (Units)

Table 8. Global Flexspline for Harmonic Drive Sales Market Share by Product Structure (2021-2026)

Table 9. Global Flexspline for Harmonic Drive Revenue by Product Structure (2021-2026) & (\$ million)

Table 10. Global Flexspline for Harmonic Drive Revenue Market Share by Product Structure (2021-2026)

Table 11. Global Flexspline for Harmonic Drive Sale Price by Product Structure (2021-2026) & (US\$/Unit)

Table 12. Major Players of Low Torque Flexspline (300 Nm)

Table 16. Major Players of Others

Table 17. Global Flexspline for Harmonic Drive Sales by Torque Class (2021-2026) & (Units)

Table 18. Global Flexspline for Harmonic Drive Sales Market Share by Torque Class (2021-2026)

Table 19. Global Flexspline for Harmonic Drive Revenue by Torque Class (2021-2026) & (\$ million)

Table 20. Global Flexspline for Harmonic Drive Revenue Market Share by Torque Class (2021-2026)

Table 21. Global Flexspline for Harmonic Drive Sale Price by Torque Class (2021-2026) & (US\$/Unit)

Table 22. Major Players of Standard Precision Flexspline (Backlash 3?10 arcmin)

Table 23. Major Players of High Precision Flexspline (Backlash 1?3 arcmin)

Table 24. Major Players of Ultra Precision Flexspline (Backlash

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Flexspline for Harmonic Drive
- Figure 2. Flexspline for Harmonic Drive Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Flexspline for Harmonic Drive Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Flexspline for Harmonic Drive Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Flexspline for Harmonic Drive Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Flexspline for Harmonic Drive Sales Market Share by Country/Region (2025)
- Figure 10. Flexspline for Harmonic Drive Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Cup Type Flexspline
- Figure 12. Product Picture of Hat Type Flexspline
- Figure 13. Product Picture of Flanged Flexspline
- Figure 14. Product Picture of Others
- Figure 15. Global Flexspline for Harmonic Drive Sales Market Share by Product Structure in 2026
- Figure 16. Global Flexspline for Harmonic Drive Revenue Market Share by Product Structure (2021-2026)
- Figure 17. Product Picture of Low Torque Flexspline (300 Nm)
- Figure 21. Product Picture of Others
- Figure 22. Global Flexspline for Harmonic Drive Sales Market Share by Torque Class in 2026
- Figure 23. Global Flexspline for Harmonic Drive Revenue Market Share by Torque Class (2021-2026)
- Figure 24. Product Picture of Standard Precision Flexspline (Backlash 3?10 arcmin)
- Figure 25. Product Picture of High Precision Flexspline (Backlash 1?3 arcmin)
- Figure 26. Product Picture of Ultra Precision Flexspline (Backlash

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