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Global Harmonic Joint Module Market Growth 2026-2032

https://marketpublishers.com/r/G2EAC144B379EN.html
Date: October 2026
Pages: 95
Price: US$ 3,660.00 (Single User License)
ID: G2EAC144B379EN

Abstracts

The global Harmonic Joint Module market size is predicted to grow from US$ 110 million in 2025 to US$ 243 million in 2032; it is expected to grow at a CAGR of 12.1% from 2026 to 2032.

A harmonic joint module is a robotic joint actuation unit that integrates core components—such as a harmonic drive, motor, encoder, driver, brake, and structural elements—serving as a critical functional module for enabling rotational motion, precise positioning, and torque output in industrial, collaborative, and humanoid robots.

Centered around the harmonic drive, the module utilizes flexible deformation to achieve high reduction ratios and transmission precision, converting the motor's high-speed, low-torque output into the low-speed, high-torque motion required for robotic joints. Compared to traditional gear transmission systems, harmonic joint modules offer advantages such as high reduction ratios, high precision, high rigidity, low backlash, compact structure, and lightweight design; they are particularly well-suited for robotic joint applications with stringent requirements regarding space, weight, and motion accuracy.

These modules typically feature a compact, hollow, integrated design that combines the drive board, encoder, motor, and harmonic drive into a single unit. Some products prioritize high rigidity and high power density, integrating the drive board, dual magnetic encoders, frameless motor, and harmonic drive. By employing a flat, lightweight design that integrates drive and control functions, along with an inner-rotor hollow structure for cable routing, certain models can achieve precision levels of up to 20 arc-seconds.

The technological development of harmonic joint modules is primarily advancing toward

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high power density, high precision, miniaturization, intelligence, and integration. While traditional robot joints typically consist of discrete components—motors, speed reducers, encoders, and drives—new-generation joint modules increasingly integrate these elements, resulting in more compact structural designs and simplified robot assembly processes. Core technology remains centered on harmonic reducers, focusing on aspects such as flexspline fatigue life, tooth profile design, transmission efficiency, and backlash control. Concurrently, driven by the growing demand for collaborative robots and humanoid robots, joint modules are incorporating torque sensors, absolute encoders, and intelligent control units to enable force control, safe interaction, and real-time status monitoring. Future product upgrades will prioritize high torque density, low noise, low power consumption, and module standardization.

The global robotics industry is propelled by policies supporting intelligent manufacturing, industrial automation, and artificial intelligence. China’s ongoing promotion of intelligent manufacturing, robotics industry development plans, and the localization of high-end equipment creates growth opportunities for manufacturers of core robotic components; meanwhile, countries such as Japan, Germany, and the United States are leveraging their established industrial robotics sectors to accelerate technological upgrades and expand application areas. In recent years, humanoid robots have garnered significant attention from global technology companies and capital markets, prompting supply chain enterprises—particularly those involved in core components like precision reducers, servo motors, and joint modules—to accelerate their strategic positioning. Nevertheless, the robotics industry remains in the early stages of commercialization; large-scale adoption requires further addressing challenges related to cost, reliability, supply chain stability, and the maturity of application scenarios.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Harmonic Joint Module 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 Harmonic Joint

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Module portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Harmonic Joint Module market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Harmonic Joint Module 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 Harmonic Joint Module.

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

Segmentation by Type:

Hollow-Type Joint Module

Solid-Type Joint Module

Segmentation by Outer Diameter:

40-80mm

80-120mm

Segmentation by Repeat Positioning Accuracy:

15 Arcseconds

20 Arcseconds

Segmentation by Application:

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Humanoid Robots

Industrial Robots

Surgical Robots

Special-Purpose Robots

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

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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.

Harmonic Drive Systems

Nabtesco Corporation

Nidec Corporation

Wittenstein

Maxon Motor

Yiyou Technology

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Liangzhi Joint

Juxie Intelligent

Midea Industrial

Leadshine Intelligent

Key Questions Addressed in this Report

What is the 10-year outlook for the global Harmonic Joint Module market?

What factors are driving Harmonic Joint Module market growth, globally and by region?

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

How do Harmonic Joint Module market opportunities vary by end market size?

How does Harmonic Joint Module break out by Type, by Application?

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