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Global Humanoid Robot Encoder Market Growth 2026-2032

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Abstracts

The global Humanoid Robot Encoder market size is predicted to grow from US$ 30.81 million in 2025 to US$ 193 million in 2032; it is expected to grow at a CAGR of 30.1% from 2026 to 2032.

Humanoid Robot Encoder refers to precision position-feedback devices integrated into humanoid robot actuators, rotary joints, dexterous hands and other motion axes to measure angular position, rotational displacement, speed and direction and provide real-time feedback to servo drives and motion controllers. The product is a critical sensing component in the closed-loop joint-control system and primarily includes absolute and incremental encoders based on magnetic, inductive, optical and other sensing technologies. Key performance parameters include absolute accuracy, resolution, external diameter, thickness, through-bore size, rotational speed, communication interface and resistance to vibration, electromagnetic interference and environmental contamination. Human-shaped joint architectures increasingly require compact, hollow and highly integrated encoder designs, while selected high-performance joints use both motor-side and gearbox output-side position feedback to compensate for transmission error and improve absolute joint accuracy. The upstream chain includes sensing chips, magnetic rings or code discs, coils and gratings, printed circuit boards, signal-processing devices and precision structural components; midstream participants design and manufacture encoders and feedback modules, while downstream demand comes from humanoid robot OEMs, actuator and integrated joint suppliers and dexterous-hand manufacturers. Humanoid Robot Encoder therefore occupies a high-value feedback position between precision sensing components and robot joint control.

Key Findings

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Global Humanoid Robot Encoder shipments were approximately 0.9 million units in 2025

Weighted manufacturer FOB pricing averaged approximately US$35 per unit in 2025

Absolute encoders represent the principal product type for humanoid robot joint feedback

Asia Pacific is the largest regional market, with China forming the primary demand and supply center

Market Trends

The Humanoid Robot Encoder market is shifting rapidly from conventional servo-motor feedback products toward compact, joint-integrated and multi-feedback sensing solutions designed specifically for humanoid robot architectures. The increasing number of degrees of freedom in humanoid robots creates substantially higher encoder content per robot than in conventional six-axis industrial robots. At the same time, joint designs are moving toward thinner profiles, larger through-bores and higher integration in order to accommodate motors, reducers, cables and sensing components within limited mechanical space. Dual-feedback architectures are emerging in high-performance joints, combining motor-side position feedback with gearbox output-side measurement to compensate for backlash, elasticity and transmission errors. Unitree G1 already specifies dual encoders at the joint level, while HEIDENHAIN has developed a dual encoder that measures both motor and gearbox output positions in a single device. Magnetic and inductive sensing technologies are gaining importance because of compact dimensions, contamination resistance and flexible hollow-shaft integration, while optical products retain advantages in high-resolution and high-accuracy applications. Product development is increasingly focused on absolute position retention, higher resolution, lower profile, large hollow structures, integrated dual sensing, lower power consumption and simplified joint assembly.

Market Dynamics

Drivers

The primary demand driver is the transition of humanoid robots from prototype development toward pilot production and early commercial deployment. Higher production volumes directly increase demand for position-feedback components, while

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rising degrees of freedom increase encoder content per robot. China's Ministry of Industry and Information Technology has identified high-precision sensing, compact robot limbs and high-integration components as important development areas and set a policy objective for humanoid robots to achieve batch production, reinforcing investment across the component supply chain. Another important driver is the increasing accuracy requirement of humanoid robot joints. Stable walking, dynamic balance, coordinated manipulation and precise grasping all depend on high-frequency closed-loop joint feedback, creating demand for compact absolute encoders with improved accuracy, resolution and robustness. The move toward integrated rotary actuators also increases the value of encoders designed specifically around motor and reducer geometry.

Restraints

Humanoid Robot Encoder demand remains constrained by the early commercial stage of the humanoid robot industry. Robot production volumes are still significantly below those of mature industrial automation equipment, while differences in joint architecture, reducer selection, communication protocol and mechanical envelope limit product standardization. Cost pressure is also substantial because humanoid robot manufacturers are targeting rapid reductions in total bill of materials as production scales. Encoders must therefore balance precision, compactness and reliability with aggressive cost targets. High-end optical and imported precision feedback products may face replacement pressure in cost-sensitive joints, while lower-cost magnetic solutions must continue improving accuracy, temperature stability and resistance to electromagnetic interference to penetrate higher-performance applications.

Opportunities

The largest opportunity comes from increasing encoder content per humanoid robot rather than robot shipments alone. Large load-bearing joints, compact wrist and neck joints and dexterous-hand actuators require different sizes and performance levels, creating a broad product spectrum from micro encoders to large hollow-ring designs. Dual-encoder or integrated dual-sensing solutions represent another high-value opportunity as manufacturers seek more accurate output-side joint measurement and full closed-loop compensation. Human-shaped robots also create demand for ultra-thin, ultra-narrow and large-through-bore designs that are less important in traditional general-purpose automation. Chinese suppliers are accelerating commercialization of magnetic and inductive robot encoders, while established international suppliers retain opportunities in high-accuracy, safety-rated and high-reliability designs. Batteryless absolute position retention, higher-speed digital interfaces and integrated condition monitoring may provide additional value as humanoid robots move toward longer

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operating hours and more complex commercial tasks.

Challenges

The principal technical challenge is achieving high absolute accuracy and repeatability within extremely limited joint space while maintaining robustness against vibration, shock, motor magnetic fields, temperature variation and assembly tolerances. Encoder performance after integration can differ from laboratory specifications because concentricity, air gap, reducer deformation and structural stiffness affect actual measurement accuracy. Dual-feedback architectures further increase calibration and signal-fusion complexity. The industry also lacks a fully standardized humanoid joint architecture: different OEMs use different actuator dimensions, reducer technologies, wiring layouts and control protocols, resulting in substantial customization. Rapid product iteration creates an additional commercial risk because encoder suppliers may need to redesign mechanical dimensions or interfaces before a robot platform reaches stable mass production.

Industry Chain Analysis

The upstream industry chain includes magnetic rings and magnetic materials, optical code discs and gratings, inductive coils, sensing and signal-processing chips, printed circuit boards, connectors, precision structural components and electronic control components. Sensor architecture and signal-processing algorithms determine resolution, absolute accuracy, latency and environmental robustness, while mechanical design determines thickness, external diameter, hollow-bore capability and integration flexibility. Midstream manufacturers perform sensing architecture development, mechanical and electronic design, calibration, signal compensation, communication-interface integration, manufacturing and reliability testing. As humanoid robot joints become more compact, value creation is increasingly shifting from standardized encoder assembly toward application-specific co-design with actuator and robot OEM customers.

Downstream customers consist primarily of humanoid robot OEMs, integrated joint and actuator manufacturers and dexterous-hand suppliers. Encoders may be supplied as independent components, incorporated into motor-feedback assemblies or integrated directly into compact joint modules. The unit value of the encoder is relatively small compared with a complete humanoid robot, but its failure or measurement error can directly affect joint control, balance and operational safety, supporting comparatively high technical value and customer qualification barriers. Profitability is therefore

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generally stronger for high-accuracy absolute, ultra-thin hollow, dual-sensing and customized products than for standardized low-resolution devices, although rapid localization and production scaling are expected to place continued pressure on unit pricing.

Segment Insights

By encoder type, absolute encoders represent the principal product category because humanoid robots require reliable knowledge of joint position during startup, shutdown and dynamic motion. Incremental encoders remain relevant in selected motor-control and cost-sensitive applications but account for a smaller role in high-value joint feedback. By sensing technology, magnetic encoders benefit from compact dimensions, environmental robustness and cost efficiency, while inductive technologies are increasingly attractive for thin, hollow and electromagnetically robust joint architectures. Optical encoders remain important where higher precision and resolution justify greater system complexity. Nikon’s industrial robot encoder portfolio demonstrates that optical absolute technologies can reach very high resolution while maintaining compact dimensions, and its hollow-shaft products are specifically positioned for multi-joint robot actuators.

External diameter provides a practical segmentation for humanoid applications because encoder size closely follows joint geometry. Products of 20 mm and below are primarily associated with dexterous hands and miniature actuators; the 20–40 mm class addresses compact arm, wrist, neck and other medium-sized joint architectures; products above 40 mm are increasingly used in larger hollow joints and higher-load actuator systems. Application demand can correspondingly be divided among lower-limb joints, upper-limb joints, dexterous-hand joints and torso, neck and head joints. Large joints emphasize absolute accuracy, hollow structure and output-side feedback, while dexterous-hand applications prioritize miniaturization, low weight and high channel density.

Downstream Market Opportunities

Lower-limb and major upper-limb joints form the most technically demanding demand base because walking, balance and load-bearing manipulation require stable, precise and high-bandwidth position feedback. As humanoid robots move from demonstration toward manufacturing, logistics and service applications, reliability under continuous dynamic loading is expected to become increasingly important. Dexterous hands represent a different opportunity: individual encoder value is lower, but the large number

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of small actuators and joints can materially increase encoder content per robot. The expansion of active fingers, articulated wrists and highly integrated compact actuators therefore creates demand for miniaturized and low-cost position-feedback solutions. Torso, waist, neck and head motion axes provide additional demand for compact hollow or integrated encoder configurations.

Regional Insights

Asia Pacific represents the largest Humanoid Robot Encoder market, with China forming the most important manufacturing and commercialization center. China benefits from a broad robot-component supply chain, rapidly expanding humanoid robot OEM activity and strong domestic capabilities in motors, reducers, controllers, sensors and precision manufacturing. National policy has also emphasized batch production of humanoid robots and the development of secure and reliable core-component supply chains, supporting localization of encoder technologies. Japan maintains strong capabilities in precision encoders, servo motors and robotic motion control, supporting high-end component supply and technology development. North America remains important for advanced humanoid platforms and artificial-intelligence-driven robotics, creating demand for high-performance joint sensing and customized feedback systems. Europe has a strong position in precision measurement, industrial motion control and advanced encoder engineering, with opportunities concentrated in high-accuracy, safety-oriented and premium joint-feedback applications.

Competitive Landscape Analysis

The Humanoid Robot Encoder market remains fragmented and technologically diverse, combining established international precision-feedback suppliers with a rapidly expanding Chinese specialist supply base. International companies such as HEIDENHAIN, RLS, Netzer, Nikon, TAMAGAWA SEIKI, POSITAL, Novanta through Celera Motion and FAULHABER compete through precision measurement, absolute-position technology, compact hollow designs, servo integration and long-term reliability. Chinese suppliers including Beijing KingKong Technology, Shanghai Gongwang Electronic Technology, Guangzhou Haozhi Industrial, Shanghai Shengnai Technology, Zeroerr Control, Zhejiang Reagle Sensing Technology, Changchun Yuheng Optics, YINGDONG and Leadshine increasingly compete through robot-specific product development, compact magnetic or inductive architectures, customization and localized cost advantages. Recent Chinese product development is particularly active in ultra-thin, large-through-bore and integrated dual encoders: KingKong offers robot-specific magnetic dual encoders with two-axis measurement, while Shengnai and Gongwang

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have developed thin inductive dual-encoder and compact joint products. Competition is therefore shifting from traditional encoder specifications alone toward joint-level integration, mechanical miniaturization, dual-feedback capability, calibration consistency, mass-production cost and the ability to co-develop products with humanoid robot and actuator manufacturers.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Humanoid Robot Encoder 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 Humanoid Robot Encoder portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Humanoid Robot Encoder market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Humanoid Robot Encoder 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 Humanoid Robot Encoder.

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

Market Segmentation

Segmentation by Type:

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Magnetic

Inductive

Optical

Others

Segmentation by Encoder:

Absolute Encoder

Incremental Encoder

Segmentation by Outer Diameter:

?20 mm

20–40 mm

>40 mm

Segmentation by Application:

Lower-Limb Joints

Upper-Limb Joints

Dexterous Hand Joints

Torso, Neck & Head Joints

This report also splits the market by region:

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Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

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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.

DR. JOHANNES HEIDENHAIN GmbH

RLS Merilna tehnika d.o.o.

Netzer Precision Position Sensors A.C.S. Ltd.

Novanta Inc. (Celera Motion)

Nikon Corporation

TAMAGAWA SEIKI CO., LTD.

POSITAL B.V.

Dr. Fritz Faulhaber GmbH & Co. KG

Beijing KingKong Technology Co., Ltd.

Shanghai Gongwang Electronic Technology Co., Ltd.

Guangzhou Haozhi Industrial Co., Ltd.

Shanghai Shengnai Technology Co., Ltd.

Zeroerr Control Co., Ltd.

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Zhejiang Reagle Sensing Technology Incorporated

Changchun Yuheng Optics Co., Ltd.

YINGDONG Co., Ltd.

Shenzhen Leadshine Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Humanoid Robot Encoder market?

What factors are driving Humanoid Robot Encoder market growth, globally and by region?

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

How do Humanoid Robot Encoder market opportunities vary by end market size?

How does Humanoid Robot Encoder break out by Type, by Application?

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