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Global Robot Torque Sensors Market Growth 2026-2032

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Abstracts

The global Robot Torque Sensors market size is predicted to grow from US$ 65.05 million in 2025 to US$ 124 million in 2032; it is expected to grow at a CAGR of 9.6% from 2026 to 2032.

Robot Joint Torque Sensors refer to precision sensing devices specifically designed to directly measure torque generated or transmitted at robotic joints and provide real-time torque feedback for force control, compliant motion, collision detection, safety protection, and motion control. A typical sensor consists of an elastic load-bearing structure, torque-sensitive elements such as strain gauges, capacitive or magnetic sensing elements, signal-conditioning circuitry, temperature-compensation components, and electrical interfaces; advanced products may further integrate analog-to-digital conversion, embedded processing, and digital communication interfaces such as CAN, RS485, EtherCAT, or SPI. These sensors are typically installed in or around rotary joints, joint reducers, or actuators of industrial robots, collaborative robots, humanoid robots, medical robots, and service robots. The market covers independently manufactured and supplied standard, thin-profile, hollow-shaft, integrated-electronics, and OEM-customized robot joint torque sensors. It excludes six-axis force/torque sensors, robot wrist force/torque sensors, general-purpose industrial torque transducers, strain gauges and other upstream sensing elements, position encoders, tactile sensors, as well as complete reducers, actuators, joint modules, and robot systems.

Key Findings

Joint-level torque sensing is becoming a core feedback layer for precision force control, compliant motion, collision detection, and robot functional safety

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Strain gauge sensing remains the mainstream technical route, while capacitive and magnetic designs are expanding alternative integration options

Industrial and collaborative robots provide the established demand base, while humanoid robots are creating a new high-growth application direction

Asia accounted for 74% of global industrial robot installations in 2024, supporting a large regional demand base for robot sensing components

Market Trends

The Robot Torque Sensors market is moving toward thinner mechanical structures, higher overload tolerance, greater electronics integration, and deeper integration with robot joint architectures. Traditional standalone reaction torque sensors are increasingly being replaced or supplemented by low-profile and hollow-center designs that can be embedded directly around motors, strain-wave gears, bearings, or joint output structures without materially increasing actuator dimensions. Digital communication is also becoming more important as robot manufacturers seek deterministic, low-latency torque feedback for advanced force-control algorithms. Bota Systems' BTS series demonstrates this direction with ultra-thin products integrating EtherCAT communication, while AIDIN ROBOTICS combines a compact joint torque sensor architecture with integrated electronics and IMU functionality. FUTEK is developing customized low-profile solutions around strain-wave gearing, reflecting growing demand for sensors that are mechanically co-designed with robot joints rather than added after actuator design. At the sensing-principle level, strain gauge technology continues to benefit from established manufacturing and calibration know-how, while capacitive and magnetic approaches are being developed to improve structural simplicity, manufacturability, miniaturization, or cost performance for higher-volume robotic platforms.

Market Dynamics

Drivers

Demand is primarily driven by the transition from position-controlled robots toward robots capable of direct force interaction with objects and people. Joint torque feedback enables more accurate control of contact forces during assembly, grinding, polishing, insertion, and other process-sensitive operations, while collaborative and medical robots

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require torque information for collision detection, force limitation, and compliant behavior. Industrial automation expansion remains the fundamental volume driver: the International Federation of Robotics reported 542,000 industrial robot installations worldwide in 2024, with annual installations exceeding 500,000 units for the fourth consecutive year. In parallel, humanoid and embodied-intelligence platforms are increasing the number of torque-controlled joints per robot, creating additional demand for compact, lightweight sensors that can be integrated into shoulder, elbow, hip, knee, and other high-load joints.

Restraints

The main restraints are technical integration complexity and cost pressure at the joint level. Robot torque sensors must maintain stable accuracy under changing temperature, bearing loads, gearbox disturbances, structural deformation, and repeated dynamic loading, making mechanical design, strain isolation, calibration, and compensation more demanding than conventional static torque measurement. Compact robot joints also impose strict limits on diameter, thickness, weight, cabling, and allowable structural compliance. At the same time, robot OEMs increasingly expect lower sensor cost as annual production volumes rise, particularly in collaborative and humanoid robots. This creates tension between higher accuracy, redundancy, overload capability, digital electronics, and functional-safety requirements on one side and aggressive cost-down targets on the other. Customized sensor geometries further limit manufacturing standardization and can increase qualification time for individual robot platforms.

Opportunities

The most significant opportunity lies in the shift toward distributed joint-level force sensing. Humanoid robots, collaborative robots, wearable robots, and rehabilitation systems increasingly require direct torque information at multiple articulated joints rather than relying solely on motor-current estimation or a single wrist-mounted multi-axis sensor. This favors ultra-thin, hollow, lightweight, and digitally integrated torque sensors that can be designed directly into actuator architectures. Capacitive and magnetic sensing technologies also create opportunities for suppliers seeking lower component count, alternative manufacturing routes, or better suitability for high-volume production. I-PEX’s ESTORQ illustrates the commercialization potential of alternative sensing architectures: the capacitive torque sensor has been adopted as the joint shaft torque sensor in every joint of Yaskawa’s MOTOMAN-HC10DT and HC20DT collaborative robots, demonstrating that non-strain-gauge solutions can achieve production-scale robotic deployment.

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Challenges

The market faces long qualification cycles, fragmented mechanical standards, and significant differences between robot joint architectures. Torque range, shaft diameter, mounting pattern, allowable thickness, gearbox configuration, communication protocol, redundancy requirements, and safety architecture vary substantially across robot platforms, making it difficult for one standardized sensor design to serve the entire market. Human-interactive robots also require increasingly rigorous verification of overload behavior, fault detection, signal integrity, and functional safety. Suppliers must therefore balance customization with scalable manufacturing. Another challenge is competition from sensorless torque estimation based on motor current, model-based control, and integrated actuator algorithms. These alternatives cannot fully replace direct torque sensing in demanding force-control applications, but improving software and motor-control accuracy may reduce the number of joints requiring dedicated hardware sensors in cost-sensitive robot designs.

Industry Chain Analysis

The upstream segment of the Robot Torque Sensors industry includes strain gauges, capacitive sensing structures, magnetic sensing materials and elements, precision alloy or stainless-steel elastic bodies, adhesives, printed circuit boards, amplifiers, analog-to-digital converters, microcontrollers, communication ICs, connectors, cables, and calibration equipment. Product performance is strongly influenced by the quality of both the mechanical sensing structure and the electronic signal chain. For strain gauge products, elastic-body machining, strain-gauge bonding, bridge design, temperature compensation, sealing, and calibration are particularly important; capacitive and magnetic technologies shift part of the value creation toward electrode or magnetic-field design, sensing electronics, and signal-processing algorithms.

The midstream consists of robot torque sensor manufacturers responsible for mechanical design, sensing-element integration, electronics, calibration, firmware, interface development, and customer-specific adaptation. The downstream includes industrial robot, collaborative robot, humanoid robot, medical robot, rehabilitation robot, exoskeleton, and joint-actuator manufacturers. Value creation increasingly moves toward suppliers capable of co-designing sensors with motors, bearings, reducers, and structural components, because the sensor must operate as part of the joint’s mechanical load path rather than as an isolated measurement device. As a result, precision machining, calibration, temperature compensation, overload design, embedded electronics, and robot-specific engineering account for a substantial portion

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of product value beyond the cost of the sensing element itself.

Segment Insights

Strain Gauge Torque Sensors currently represent the most established product category because the technology combines mature force-measurement principles with broad torque-range coverage and strong compatibility with custom mechanical structures. Sensodrive, FUTEK, Sunrise Instruments, Kunwei and several other suppliers use strain-based architectures for robot joint applications. Product development is concentrating on thinner structures, larger hollow apertures, higher overload capability, and integrated digital signal conditioning. Capacitive Torque Sensors form a smaller but strategically relevant segment. I-PEX positions electrostatic capacitance as a route to simpler construction, lower weight, easier customization, and improved suitability for volume manufacturing, making this technology particularly interesting for collaborative and other production robots.

Magnetic Torque Sensors remain an emerging alternative in robot joint applications, with potential advantages in contactless or simplified sensing structures depending on implementation. Across all three technology categories, the market is shifting from generic torque transducers toward robot-specific products characterized by compact geometry, through-hole structures, embedded amplification, CAN, RS485, EtherCAT, SPI or other digital interfaces, and closer mechanical integration with the actuator. Product value therefore increasingly depends not only on nominal accuracy but also on integration density, thermal stability, overload resistance, communications, safety architecture, and engineering adaptability.

Downstream Market Opportunities

Industrial robot joint force control remains the most mature application, particularly in assembly, grinding, polishing, insertion, welding, and other processes where contact-force consistency directly affects productivity and quality. Collaborative robots create a broader requirement for torque feedback because safe physical interaction, collision detection, and compliant behavior are fundamental design objectives rather than optional process functions. Humanoid robots represent the most important emerging opportunity because multiple shoulder, elbow, hip, knee, and other joints can require localized force or torque feedback, increasing potential sensor content per robot. Medical and rehabilitation robots form a smaller but high-value market in which smooth interaction, accurate assistance-force control, and patient safety support demand for stable and highly reliable sensing. Future downstream growth will increasingly depend

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on suppliers' ability to reduce sensor thickness, weight, cost, and integration complexity while maintaining accuracy and robustness.

Regional Insights

Asia-Pacific represents the most important combined demand and manufacturing cluster for Robot Torque Sensors. The region accounted for 74% of worldwide industrial robot installations in 2024, while China alone represented 54% of new installations, creating a large downstream base for robot components and force-control technologies. Japan remains important through established robot manufacturers and specialized sensing suppliers such as I-PEX, while South Korea has developed an emerging robot-sensor ecosystem represented by AIDIN ROBOTICS, AL.Robot, and DACELL. China is becoming particularly active in robot joint sensing, supported by companies including Sunrise Instruments, Changzhou Kunwei Sensing Technology, Keli Sensing Technology, Link-touch, PaXini Technology, Shenzhen Ligent Sensor Tech, Shenzhen XJCSENSOR Technology, Nanjing Bio-inspired Intelligent Technology, and Changzhou Right Measurement and Control System.

Europe maintains a strong position in high-precision and safety-oriented torque sensing, represented by Sensodrive in Germany and Bota Systems in Switzerland, with demand linked to collaborative robotics, medical robotics, industrial automation, and high-performance joint systems. North America is characterized by strong engineering demand for customized high-accuracy sensing solutions, with FUTEK representing a notable supplier focused on customized robot and strain-wave-gearing torque sensing. Regional competition is therefore not solely volume-driven: Asia is increasingly important for scale and new robot platforms, while European and North American suppliers remain influential in precision sensing, application engineering, digital integration, and safety-critical robot designs.

Competitive Landscape Analysis

The competitive landscape is fragmented, combining long-established precision force-sensor specialists with newer robotics-focused companies and rapidly expanding Chinese suppliers. Sensodrive occupies a strong position in mature robot-joint torque sensing and states that its torque sensors are installed in more than 100,000 products from established manufacturers, demonstrating significant accumulated commercial deployment. I-PEX differentiates through its electrostatic-capacitance ESTORQ platform and has achieved direct joint-level adoption across all axes of Yaskawa's MOTOMAN-HC10DT and HC20DT collaborative robots. FUTEK competes through customized low-

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profile strain-wave-gearing torque solutions, while Bota Systems emphasizes ultra-thin architecture, high overload capability, and integrated EtherCAT communication. AIDIN ROBOTICS is strengthening the integrated-sensor approach through its ATSB generation, while Sunrise Instruments, Changzhou Kunwei Sensing Technology, Keli Sensing Technology, AL.Robot, DACELL, Link-touch, PaXini Technology, Shenzhen Ligent Sensor Tech, Shenzhen XJCSENSOR Technology, Nanjing Bio-inspired Intelligent Technology, and Changzhou Right Measurement and Control System broaden the competitive field across China and South Korea. The next phase of competition is expected to focus on thinner and lighter designs, higher overload and thermal stability, digital communications, safety redundancy, joint-specific customization, and manufacturability at substantially higher robot production volumes.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Robot Torque Sensors and breaks down the forecast by Sensing Principle Types, 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 Robot Torque Sensors.

This report presents a comprehensive overview, market shares, and growth opportunities of Robot Torque Sensors market by product type, application, key

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manufacturers and key regions and countries.

Market Segmentation

Segmentation by Sensing Principle Types:

Strain Gauge Torque Sensors

Capacitive Torque Sensors

Magnetic Torque Sensors

Segmentation by Rated Torque Range Types:

Low Torque (<50 N·m)

Medium Torque (50–200 N·m)

High Torque (>200 N·m)

Segmentation by Measurement Accuracy Types:

Standard Accuracy (>0.2% FS)

High Accuracy (0.05–0.2% FS)

Ultra-High Accuracy (<0.05% FS)

Segmentation by Application:

Industrial Robot Joint Force Control (Assembly, Grinding, and Welding)

Collaborative Robot Joint Safety and Compliance Control

Humanoid Robot Joint Torque Feedback (Shoulder, Elbow, Hip, and Knee

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Joints)

Medical and Rehabilitation Robot Joint Control

Others

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

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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.

Sensodrive GmbH

I-PEX Inc.

FUTEK Advanced Sensor Technology, Inc.

Bota Systems AG

Sunrise Instruments Co., Ltd.

AIDIN ROBOTICS Inc.

Changzhou Kunwei Sensing Technology Co.,Ltd.

Keli Sensing Technology (Ningbo) Co.,Ltd.

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AL.Robot, Co., Ltd.

DACELL Co., Ltd.

Link-touch (Beijing) Technology Co., Ltd.

PaXini Technology (Shenzhen) Co., Ltd.

Shenzhen Ligent Sensor Tech Co., Ltd.

Shenzhen XJCSENSOR Technology Co.,Ltd.

Nanjing Bio-inspired Intelligent Technology Co., Ltd.

Changzhou Right Measurement and control system Co., Ltd

Key Questions Addressed in this Report

What is the 10-year outlook for the global Robot Torque Sensors market?

What factors are driving Robot Torque Sensors market growth, globally and by region?

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

How do Robot Torque Sensors market opportunities vary by end market size?

How does Robot Torque Sensors break out by Sensing Principle Types, by Application?

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