

Global Strain Wave Gearing Devices Market Growth 2026-2032

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Abstracts

The global Strain Wave Gearing Devices market size is predicted to grow from US\$ 521 million in 2025 to US\$ 3014 million in 2032; it is expected to grow at a CAGR of 30.9% from 2026 to 2032.

In 2024, global Strain Wave Gearing Devices production reached approximately 2.45 million units, with an average global market price of around US\$ 217 per unit. A harmonic drive precision gear reducer, also known as a strain wave gear, is a precision speed reduction mechanism that utilizes the elastic deformation of a flexible (or flexspline) wheel meshing with a rigid (or circular spline) wheel and a wave generator to transmit motion and torque. Its operation principle is based on the theory of strain wave transmission, where the wave generator induces a controlled elastic deformation in the flexible wheel, creating a tooth meshing disparity that results in speed reduction and torque multiplication. Characterized by high reduction ratios, compactness, lightweight, high rotational accuracy, and quick response, harmonic drives find extensive applications in industrial robots, precision machinery, automotive, and more.

From the perspective of market size and growth drivers, the industry has entered a period of rapid expansion. The core growth engine has evolved beyond traditional industrial robotics to encompass the transformative opportunity presented by humanoid robots. Companies like Tesla and Figure AI are accelerating the transition of humanoid robots from concept to pilot production. The significant quantity of harmonic reducers required per unit constitutes the primary expectation for the market's future explosive growth.

Regarding the competitive landscape, the global market is led by the duo of Japan's HDSI and China's Leaderdrive, which collectively hold over 63% of the global revenue

market share. A notable trend, however, is the continual emergence of new domestic entrants in China. Driven by supportive policies and promising market prospects, significant capital and talent are flowing into this sector. While these new players are unlikely to challenge the top-tier incumbents in the short term, they are intensifying competition in the mid- to low-end market segments and possess the potential to reshape the future competitive dynamics through technological differentiation.

From a product trend standpoint, technological iteration is accelerating markedly. To meet the stringent demands for high power density and low inertia in emerging applications such as humanoid robots, the adoption of lightweight materials has become a critical R&D focus. Concurrently, the development of mechatronic modules remains a dominant evolutionary path. Integrating components like torque sensors to enhance system performance and simplify downstream assembly is a key strategy for manufacturers to increase product value-added.

A regional market analysis reveals diversified growth momentum. China remains the largest production and consumption market globally. However, growth hotspots in the coming years are expected to be widespread. Markets in Europe, the US, Japan, and South Korea are anticipated to see significantly accelerated growth rates, primarily fuelled by their leading positions in the research, development, and industrialization of frontier technologies such as humanoid robots and high-end medical equipment, which will spur rapid demand within local supply chains.

A comprehensive future trend assessment indicates the industry is advancing into a new phase defined by technology-driven innovation and diverse demand. The parameters of competition have broadened from a primary focus on price and precision to a comprehensive contest involving service life reliability, lightweight design, cost control, and global service capabilities. Although the humanoid robot segment carries inherent uncertainties, the vast potential it represents has already catalysed substantial capital investment and technological innovation, providing a solid foundation for the industry's long-term prosperity.

In summary, the harmonic reducer industry is at a critical juncture, marked by the convergence of traditional automation and advanced robotics. Chinese manufacturers, exemplified by Leaderdrive, have successfully ascended to the global top tier. The key to success in the next decade will hinge on a company's ability to sustain leadership in technologies like lightweight materials, while effectively capturing opportunities in evolving markets such as Europe, America, Japan, and South Korea.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Strain Wave Gearing Devices 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 Strain Wave Gearing Devices.

This report presents a comprehensive overview, market shares, and growth opportunities of Strain Wave Gearing Devices market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Cup Style

Hat Style

Pancake Style

Segmentation by Accuracy:

?0.5 arcmin

0.5?1 arcmin

1?3 arcmin

Others

Segmentation by Sales Channel:

Direct Sales

Distribution

Segmentation by Application:

Industry Robot

Semiconductor Equipment

Flat Panel Equipment

Machine Tools

Optical Machine

Printing, Bookbinding and Paper Machine

Metal Working Machine

Medical Equipment

Space Equipment

Automotive

Defense Industry

Humanoid 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

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.

HDSI

Leaderdrive

ILJIN Motion & Control GmbH

Zhejiang Laifual

Shenzhen Han's Motion Technology

Nidec-Shimpo

OVALO GmbH

TC Drive

Beijing CTKM Harmonic Drive

Hiwin Corporation

Reach Machinery

Sichuan TLIBOT Co.,Ltd.

Ningbo Zhongda Leader Intelligent Transmission

Wanshsin Seikou

Main Drive

KHGEARS

Guangzhou Haozhi Industrial

Too Eph Transmission Technology

Guohua Intelligent Equipment

Schaeffler

BENRUN Robot

KOFON

GAM Enterprise

BHDI

SBB Tech

SPG

Jiangsu Guomao Reducer

Cone Drive

LI-MING Machinery Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Strain Wave Gearing Devices market?

What factors are driving Strain Wave Gearing Devices market growth, globally and by region?

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

How do Strain Wave Gearing Devices market opportunities vary by end market size?

How does Strain Wave Gearing Devices 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 Strain Wave Gearing Devices Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Strain Wave Gearing Devices by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Strain Wave Gearing Devices by Country/Region, 2021, 2025 & 2032
- 2.2 Strain Wave Gearing Devices Segment by Type
 - 2.2.1 Cup Style
 - 2.2.2 Hat Style
 - 2.2.3 Pancake Style
 - 2.2.4 Strain Wave Gearing Devices Sales by Type
 - 2.2.4.1 Global Strain Wave Gearing Devices Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Strain Wave Gearing Devices Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Strain Wave Gearing Devices Sale Price by Type (2021-2026)
- 2.3 Strain Wave Gearing Devices Segment by Accuracy
 - 2.3.1 ≥ 0.5 arcmin
 - 2.3.2 $0.5 \leq 1$ arcmin
 - 2.3.3 $1 \leq 3$ arcmin
 - 2.3.4 Others
 - 2.3.5 Strain Wave Gearing Devices Sales by Accuracy
 - 2.3.5.1 Global Strain Wave Gearing Devices Sales Market Share by Accuracy (2021-2026)

2.3.5.2 Global Strain Wave Gearing Devices Revenue and Market Share by Accuracy (2021-2026)

2.3.5.3 Global Strain Wave Gearing Devices Sale Price by Accuracy (2021-2026)

2.4 Strain Wave Gearing Devices Segment by Sales Channel

2.4.1 Direct Sales

2.4.2 Distribution

2.4.3 Strain Wave Gearing Devices Sales by Sales Channel

2.4.3.1 Global Strain Wave Gearing Devices Sales Market Share by Sales Channel (2021-2026)

2.4.3.2 Global Strain Wave Gearing Devices Revenue and Market Share by Sales Channel (2021-2026)

2.4.3.3 Global Strain Wave Gearing Devices Sale Price by Sales Channel (2021-2026)

2.5 Strain Wave Gearing Devices Segment by Application

2.5.1 Industry Robot

2.5.2 Semiconductor Equipment

2.5.3 Flat Panel Equipment

2.5.4 Machine Tools

2.5.5 Optical Machine

2.5.6 Printing, Bookbinding and Paper Machine

2.5.7 Metal Working Machine

2.5.8 Medical Equipment

2.5.9 Space Equipment

2.5.10 Strain Wave Gearing Devices Sales by Application

2.5.10.1 Global Strain Wave Gearing Devices Sale Market Share by Application (2021-2026)

2.5.10.2 Global Strain Wave Gearing Devices Revenue and Market Share by Application (2021-2026)

2.5.10.3 Global Strain Wave Gearing Devices Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Strain Wave Gearing Devices Breakdown Data by Company

3.1.1 Global Strain Wave Gearing Devices Annual Sales by Company (2021-2026)

3.1.2 Global Strain Wave Gearing Devices Sales Market Share by Company (2021-2026)

3.2 Global Strain Wave Gearing Devices Annual Revenue by Company (2021-2026)

3.2.1 Global Strain Wave Gearing Devices Revenue by Company (2021-2026)

3.2.2 Global Strain Wave Gearing Devices Revenue Market Share by Company

(2021-2026)

3.3 Global Strain Wave Gearing Devices Sale Price by Company

3.4 Key Manufacturers Strain Wave Gearing Devices Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Strain Wave Gearing Devices Product Location Distribution

3.4.2 Players Strain Wave Gearing Devices 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 STRAIN WAVE GEARING DEVICES BY GEOGRAPHIC REGION

4.1 World Historic Strain Wave Gearing Devices Market Size by Geographic Region (2021-2026)

4.1.1 Global Strain Wave Gearing Devices Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Strain Wave Gearing Devices Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Strain Wave Gearing Devices Market Size by Country/Region (2021-2026)

4.2.1 Global Strain Wave Gearing Devices Annual Sales by Country/Region (2021-2026)

4.2.2 Global Strain Wave Gearing Devices Annual Revenue by Country/Region (2021-2026)

4.3 Americas Strain Wave Gearing Devices Sales Growth

4.4 APAC Strain Wave Gearing Devices Sales Growth

4.5 Europe Strain Wave Gearing Devices Sales Growth

4.6 Middle East & Africa Strain Wave Gearing Devices Sales Growth

5 AMERICAS

5.1 Americas Strain Wave Gearing Devices Sales by Country

5.1.1 Americas Strain Wave Gearing Devices Sales by Country (2021-2026)

5.1.2 Americas Strain Wave Gearing Devices Revenue by Country (2021-2026)

5.2 Americas Strain Wave Gearing Devices Sales by Type (2021-2026)

5.3 Americas Strain Wave Gearing Devices Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Strain Wave Gearing Devices Sales by Region

6.1.1 APAC Strain Wave Gearing Devices Sales by Region (2021-2026)

6.1.2 APAC Strain Wave Gearing Devices Revenue by Region (2021-2026)

6.2 APAC Strain Wave Gearing Devices Sales by Type (2021-2026)

6.3 APAC Strain Wave Gearing Devices 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 Strain Wave Gearing Devices by Country

7.1.1 Europe Strain Wave Gearing Devices Sales by Country (2021-2026)

7.1.2 Europe Strain Wave Gearing Devices Revenue by Country (2021-2026)

7.2 Europe Strain Wave Gearing Devices Sales by Type (2021-2026)

7.3 Europe Strain Wave Gearing Devices 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 Strain Wave Gearing Devices by Country

8.1.1 Middle East & Africa Strain Wave Gearing Devices Sales by Country
(2021-2026)

8.1.2 Middle East & Africa Strain Wave Gearing Devices Revenue by Country

(2021-2026)

8.2 Middle East & Africa Strain Wave Gearing Devices Sales by Type (2021-2026)

8.3 Middle East & Africa Strain Wave Gearing Devices 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 Strain Wave Gearing Devices

10.3 Manufacturing Process Analysis of Strain Wave Gearing Devices

10.4 Industry Chain Structure of Strain Wave Gearing Devices

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Strain Wave Gearing Devices Distributors

11.3 Strain Wave Gearing Devices Customer

12 WORLD FORECAST REVIEW FOR STRAIN WAVE GEARING DEVICES BY GEOGRAPHIC REGION

12.1 Global Strain Wave Gearing Devices Market Size Forecast by Region

12.1.1 Global Strain Wave Gearing Devices Forecast by Region (2027-2032)

12.1.2 Global Strain Wave Gearing Devices 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 Strain Wave Gearing Devices Forecast by Type (2027-2032)
- 12.7 Global Strain Wave Gearing Devices Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 HDSI

- 13.1.1 HDSI Company Information
- 13.1.2 HDSI Strain Wave Gearing Devices Product Portfolios and Specifications
- 13.1.3 HDSI Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.1.4 HDSI Main Business Overview
- 13.1.5 HDSI Latest Developments

13.2 Leaderdrive

- 13.2.1 Leaderdrive Company Information
- 13.2.2 Leaderdrive Strain Wave Gearing Devices Product Portfolios and Specifications
- 13.2.3 Leaderdrive Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.2.4 Leaderdrive Main Business Overview
- 13.2.5 Leaderdrive Latest Developments

13.3 ILJIN Motion & Control GmbH

- 13.3.1 ILJIN Motion & Control GmbH Company Information
- 13.3.2 ILJIN Motion & Control GmbH Strain Wave Gearing Devices Product Portfolios and Specifications
- 13.3.3 ILJIN Motion & Control GmbH Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 ILJIN Motion & Control GmbH Main Business Overview
- 13.3.5 ILJIN Motion & Control GmbH Latest Developments

13.4 Zhejiang Laifual

- 13.4.1 Zhejiang Laifual Company Information
- 13.4.2 Zhejiang Laifual Strain Wave Gearing Devices Product Portfolios and Specifications
- 13.4.3 Zhejiang Laifual Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.4.4 Zhejiang Laifual Main Business Overview
- 13.4.5 Zhejiang Laifual Latest Developments

13.5 Shenzhen Han's Motion Technology

- 13.5.1 Shenzhen Han's Motion Technology Company Information
- 13.5.2 Shenzhen Han's Motion Technology Strain Wave Gearing Devices Product Portfolios and Specifications
- 13.5.3 Shenzhen Han's Motion Technology Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.5.4 Shenzhen Han's Motion Technology Main Business Overview
- 13.5.5 Shenzhen Han's Motion Technology Latest Developments
- 13.6 Nidec-Shimpo
 - 13.6.1 Nidec-Shimpo Company Information
 - 13.6.2 Nidec-Shimpo Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.6.3 Nidec-Shimpo Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Nidec-Shimpo Main Business Overview
 - 13.6.5 Nidec-Shimpo Latest Developments
- 13.7 OVALO GmbH
 - 13.7.1 OVALO GmbH Company Information
 - 13.7.2 OVALO GmbH Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.7.3 OVALO GmbH Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 OVALO GmbH Main Business Overview
 - 13.7.5 OVALO GmbH Latest Developments
- 13.8 TC Drive
 - 13.8.1 TC Drive Company Information
 - 13.8.2 TC Drive Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.8.3 TC Drive Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 TC Drive Main Business Overview
 - 13.8.5 TC Drive Latest Developments
- 13.9 Beijing CTKM Harmonic Drive
 - 13.9.1 Beijing CTKM Harmonic Drive Company Information
 - 13.9.2 Beijing CTKM Harmonic Drive Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.9.3 Beijing CTKM Harmonic Drive Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Beijing CTKM Harmonic Drive Main Business Overview
 - 13.9.5 Beijing CTKM Harmonic Drive Latest Developments
- 13.10 Hiwin Corporation

- 13.10.1 Hiwin Corporation Company Information
- 13.10.2 Hiwin Corporation Strain Wave Gearing Devices Product Portfolios and Specifications
- 13.10.3 Hiwin Corporation Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.10.4 Hiwin Corporation Main Business Overview
- 13.10.5 Hiwin Corporation Latest Developments
- 13.11 Reach Machinery
 - 13.11.1 Reach Machinery Company Information
 - 13.11.2 Reach Machinery Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.11.3 Reach Machinery Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Reach Machinery Main Business Overview
 - 13.11.5 Reach Machinery Latest Developments
- 13.12 Sichuan TLIBOT Co.,Ltd.
 - 13.12.1 Sichuan TLIBOT Co.,Ltd. Company Information
 - 13.12.2 Sichuan TLIBOT Co.,Ltd. Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.12.3 Sichuan TLIBOT Co.,Ltd. Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Sichuan TLIBOT Co.,Ltd. Main Business Overview
 - 13.12.5 Sichuan TLIBOT Co.,Ltd. Latest Developments
- 13.13 Ningbo Zhongda Leader Intelligent Transmission
 - 13.13.1 Ningbo Zhongda Leader Intelligent Transmission Company Information
 - 13.13.2 Ningbo Zhongda Leader Intelligent Transmission Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.13.3 Ningbo Zhongda Leader Intelligent Transmission Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 Ningbo Zhongda Leader Intelligent Transmission Main Business Overview
 - 13.13.5 Ningbo Zhongda Leader Intelligent Transmission Latest Developments
- 13.14 Wanshsin Seikou
 - 13.14.1 Wanshsin Seikou Company Information
 - 13.14.2 Wanshsin Seikou Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.14.3 Wanshsin Seikou Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 Wanshsin Seikou Main Business Overview
 - 13.14.5 Wanshsin Seikou Latest Developments

13.15 Main Drive

13.15.1 Main Drive Company Information

13.15.2 Main Drive Strain Wave Gearing Devices Product Portfolios and Specifications

13.15.3 Main Drive Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Main Drive Main Business Overview

13.15.5 Main Drive Latest Developments

13.16 KHGEARS

13.16.1 KHGEARS Company Information

13.16.2 KHGEARS Strain Wave Gearing Devices Product Portfolios and Specifications

13.16.3 KHGEARS Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 KHGEARS Main Business Overview

13.16.5 KHGEARS Latest Developments

13.17 Guangzhou Haozhi Industrial

13.17.1 Guangzhou Haozhi Industrial Company Information

13.17.2 Guangzhou Haozhi Industrial Strain Wave Gearing Devices Product Portfolios and Specifications

13.17.3 Guangzhou Haozhi Industrial Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Guangzhou Haozhi Industrial Main Business Overview

13.17.5 Guangzhou Haozhi Industrial Latest Developments

13.18 Too Eph Transmission Technology

13.18.1 Too Eph Transmission Technology Company Information

13.18.2 Too Eph Transmission Technology Strain Wave Gearing Devices Product Portfolios and Specifications

13.18.3 Too Eph Transmission Technology Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Too Eph Transmission Technology Main Business Overview

13.18.5 Too Eph Transmission Technology Latest Developments

13.19 Guohua Intelligent Equipment

13.19.1 Guohua Intelligent Equipment Company Information

13.19.2 Guohua Intelligent Equipment Strain Wave Gearing Devices Product Portfolios and Specifications

13.19.3 Guohua Intelligent Equipment Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Guohua Intelligent Equipment Main Business Overview

13.19.5 Guohua Intelligent Equipment Latest Developments

13.20 Schaeffler

13.20.1 Schaeffler Company Information

13.20.2 Schaeffler Strain Wave Gearing Devices Product Portfolios and Specifications

13.20.3 Schaeffler Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Schaeffler Main Business Overview

13.20.5 Schaeffler Latest Developments

13.21 BENRUN Robot

13.21.1 BENRUN Robot Company Information

13.21.2 BENRUN Robot Strain Wave Gearing Devices Product Portfolios and Specifications

13.21.3 BENRUN Robot Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 BENRUN Robot Main Business Overview

13.21.5 BENRUN Robot Latest Developments

13.22 KOFON

13.22.1 KOFON Company Information

13.22.2 KOFON Strain Wave Gearing Devices Product Portfolios and Specifications

13.22.3 KOFON Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 KOFON Main Business Overview

13.22.5 KOFON Latest Developments

13.23 GAM Enterprise

13.23.1 GAM Enterprise Company Information

13.23.2 GAM Enterprise Strain Wave Gearing Devices Product Portfolios and Specifications

13.23.3 GAM Enterprise Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 GAM Enterprise Main Business Overview

13.23.5 GAM Enterprise Latest Developments

13.24 BHDl

13.24.1 BHDl Company Information

13.24.2 BHDl Strain Wave Gearing Devices Product Portfolios and Specifications

13.24.3 BHDl Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 BHDl Main Business Overview

13.24.5 BHDl Latest Developments

13.25 SBB Tech

13.25.1 SBB Tech Company Information

- 13.25.2 SBB Tech Strain Wave Gearing Devices Product Portfolios and Specifications
- 13.25.3 SBB Tech Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.25.4 SBB Tech Main Business Overview
- 13.25.5 SBB Tech Latest Developments
- 13.26 SPG
 - 13.26.1 SPG Company Information
 - 13.26.2 SPG Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.26.3 SPG Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.26.4 SPG Main Business Overview
 - 13.26.5 SPG Latest Developments
- 13.27 Jiangsu Guomao Reducer
 - 13.27.1 Jiangsu Guomao Reducer Company Information
 - 13.27.2 Jiangsu Guomao Reducer Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.27.3 Jiangsu Guomao Reducer Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.27.4 Jiangsu Guomao Reducer Main Business Overview
 - 13.27.5 Jiangsu Guomao Reducer Latest Developments
- 13.28 Cone Drive
 - 13.28.1 Cone Drive Company Information
 - 13.28.2 Cone Drive Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.28.3 Cone Drive Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.28.4 Cone Drive Main Business Overview
 - 13.28.5 Cone Drive Latest Developments
- 13.29 LI-MING Machinery Co., Ltd.
 - 13.29.1 LI-MING Machinery Co., Ltd. Company Information
 - 13.29.2 LI-MING Machinery Co., Ltd. Strain Wave Gearing Devices Product Portfolios and Specifications
 - 13.29.3 LI-MING Machinery Co., Ltd. Strain Wave Gearing Devices Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.29.4 LI-MING Machinery Co., Ltd. Main Business Overview
 - 13.29.5 LI-MING Machinery Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Strain Wave Gearing Devices Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Strain Wave Gearing Devices Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Cup Style

Table 4. Major Players of Hat Style

Table 5. Major Players of Pancake Style

Table 6. Global Strain Wave Gearing Devices Sales by Type (2021-2026) & (K Units)

Table 7. Global Strain Wave Gearing Devices Sales Market Share by Type (2021-2026)

Table 8. Global Strain Wave Gearing Devices Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Strain Wave Gearing Devices Revenue Market Share by Type (2021-2026)

Table 10. Global Strain Wave Gearing Devices Sale Price by Type (2021-2026) & (US\$/Unit)

Table 11. Major Players of ≥ 0.5 arcmin

Table 12. Major Players of $0.5 \leq 1$ arcmin

Table 13. Major Players of $1 \leq 3$ arcmin

Table 14. Major Players of Others

Table 15. Global Strain Wave Gearing Devices Sales by Accuracy (2021-2026) & (K Units)

Table 16. Global Strain Wave Gearing Devices Sales Market Share by Accuracy (2021-2026)

Table 17. Global Strain Wave Gearing Devices Revenue by Accuracy (2021-2026) & (\$ million)

Table 18. Global Strain Wave Gearing Devices Revenue Market Share by Accuracy (2021-2026)

Table 19. Global Strain Wave Gearing Devices Sale Price by Accuracy (2021-2026) & (US\$/Unit)

Table 20. Major Players of Direct Sales

Table 21. Major Players of Distribution

Table 22. Global Strain Wave Gearing Devices Sales by Sales Channel (2021-2026) & (K Units)

Table 23. Global Strain Wave Gearing Devices Sales Market Share by Sales Channel (2021-2026)

Table 24. Global Strain Wave Gearing Devices Revenue by Sales Channel (2021-2026) & (\$ million)

Table 25. Global Strain Wave Gearing Devices Revenue Market Share by Sales Channel (2021-2026)

Table 26. Global Strain Wave Gearing Devices Sale Price by Sales Channel (2021-2026) & (US\$/Unit)

Table 27. Global Strain Wave Gearing Devices Sale by Application (2021-2026) & (K Units)

Table 28. Global Strain Wave Gearing Devices Sale Market Share by Application (2021-2026)

Table 29. Global Strain Wave Gearing Devices Revenue by Application (2021-2026) & (\$ million)

Table 30. Global Strain Wave Gearing Devices Revenue Market Share by Application (2021-2026)

Table 31. Global Strain Wave Gearing Devices Sale Price by Application (2021-2026) & (US\$/Unit)

Table 32. Global Strain Wave Gearing Devices Sales by Company (2021-2026) & (K Units)

Table 33. Global Strain Wave Gearing Devices Sales Market Share by Company (2021-2026)

Table 34. Global Strain Wave Gearing Devices Revenue by Company (2021-2026) & (\$ millions)

Table 35. Global Strain Wave Gearing Devices Revenue Market Share by Company (2021-2026)

Table 36. Global Strain Wave Gearing Devices Sale Price by Company (2021-2026) & (US\$/Unit)

Table 37. Key Manufacturers Strain Wave Gearing Devices Producing Area Distribution and Sales Area

Table 38. Players Strain Wave Gearing Devices Products Offered

Table 39. Strain Wave Gearing Devices Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 40. New Products and Potential Entrants

Table 41. Market M&A Activity & Strategy

Table 42. Global Strain Wave Gearing Devices Sales by Geographic Region (2021-2026) & (K Units)

Table 43. Global Strain Wave Gearing Devices Sales Market Share Geographic Region (2021-2026)

Table 44. Global Strain Wave Gearing Devices Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 45. Global Strain Wave Gearing Devices Revenue Market Share by Geographic Region (2021-2026)

Table 46. Global Strain Wave Gearing Devices Sales by Country/Region (2021-2026) & (K Units)

Table 47. Global Strain Wave Gearing Devices Sales Market Share by Country/Region (2021-2026)

Table 48. Global Strain Wave Gearing Devices Revenue by Country/Region (2021-2026) & (\$ millions)

Table 49. Global Strain Wave Gearing Devices Revenue Market Share by Country/Region (2021-2026)

Table 50. Americas Strain Wave Gearing Devices Sales by Country (2021-2026) & (K Units)

Table 51. Americas Strain Wave Gearing Devices Sales Market Share by Country (2021-2026)

Table 52. Americas Strain Wave Gearing Devices Revenue by Country (2021-2026) & (\$ millions)

Table 53. Americas Strain Wave Gearing Devices Sales by Type (2021-2026) & (K Units)

Table 54. Americas Strain Wave Gearing Devices Sales by Application (2021-2026) & (K Units)

Table 55. APAC Strain Wave Gearing Devices Sales by Region (2021-2026) & (K Units)

Table 56. APAC Strain Wave Gearing Devices Sales Market Share by Region (2021-2026)

Table 57. APAC Strain Wave Gearing Devices Revenue by Region (2021-2026) & (\$ millions)

Table 58. APAC Strain Wave Gearing Devices Sales by Type (2021-2026) & (K Units)

Table 59. APAC Strain Wave Gearing Devices Sales by Application (2021-2026) & (K Units)

Table 60. Europe Strain Wave Gearing Devices Sales by Country (2021-2026) & (K Units)

Table 61. Europe Strain Wave Gearing Devices Revenue by Country (2021-2026) & (\$ millions)

Table 62. Europe Strain Wave Gearing Devices Sales by Type (2021-2026) & (K Units)

Table 63. Europe Strain Wave Gearing Devices Sales by Application (2021-2026) & (K Units)

Table 64. Middle East & Africa Strain Wave Gearing Devices Sales by Country (2021-2026) & (K Units)

Table 65. Middle East & Africa Strain Wave Gearing Devices Revenue Market Share by Country (2021-2026)

Table 66. Middle East & Africa Strain Wave Gearing Devices Sales by Type (2021-2026) & (K Units)
Table 67. Middle East & Africa Strain Wave Gearing Devices Sales by Application (2021-2026) & (K Units)
Table 68. Key Market Drivers & Growth Opportunities of Strain Wave Gearing Devices
Table 69. Key Market Challenges & Risks of Strain Wave Gearing Devices
Table 70. Key Industry Trends of Strain Wave Gearing Devices
Table 71. Strain Wave Gearing Devices Raw Material
Table 72. Key Suppliers of Raw Materials
Table 73. Strain Wave Gearing Devices Distributors List
Table 74. Strain Wave Gearing Devices Customer List
Table 75. Global Strain Wave Gearing Devices Sales Forecast by Region (2027-2032) & (K Units)
Table 76. Global Strain Wave Gearing Devices Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 77. Americas Strain Wave Gearing Devices Sales Forecast by Country (2027-2032) & (K Units)
Table 78. Americas Strain Wave Gearing Devices Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 79. APAC Strain Wave Gearing Devices Sales Forecast by Region (2027-2032) & (K Units)
Table 80. APAC Strain Wave Gearing Devices Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 81. Europe Strain Wave Gearing Devices Sales Forecast by Country (2027-2032) & (K Units)
Table 82. Europe Strain Wave Gearing Devices Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 83. Middle East & Africa Strain Wave Gearing Devices Sales Forecast by Country (2027-2032) & (K Units)
Table 84. Middle East & Africa Strain Wave Gearing Devices Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 85. Global Strain Wave Gearing Devices Sales Forecast by Type (2027-2032) & (K Units)
Table 86. Global Strain Wave Gearing Devices Revenue Forecast by Type (2027-2032) & (\$ millions)
Table 87. Global Strain Wave Gearing Devices Sales Forecast by Application (2027-2032) & (K Units)
Table 88. Global Strain Wave Gearing Devices Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 89. HDSI Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 90. HDSI Strain Wave Gearing Devices Product Portfolios and Specifications

Table 91. HDSI Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 92. HDSI Main Business

Table 93. HDSI Latest Developments

Table 94. Leaderdrive Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 95. Leaderdrive Strain Wave Gearing Devices Product Portfolios and Specifications

Table 96. Leaderdrive Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 97. Leaderdrive Main Business

Table 98. Leaderdrive Latest Developments

Table 99. ILJIN Motion & Control GmbH Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 100. ILJIN Motion & Control GmbH Strain Wave Gearing Devices Product Portfolios and Specifications

Table 101. ILJIN Motion & Control GmbH Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 102. ILJIN Motion & Control GmbH Main Business

Table 103. ILJIN Motion & Control GmbH Latest Developments

Table 104. Zhejiang Laifual Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 105. Zhejiang Laifual Strain Wave Gearing Devices Product Portfolios and Specifications

Table 106. Zhejiang Laifual Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 107. Zhejiang Laifual Main Business

Table 108. Zhejiang Laifual Latest Developments

Table 109. Shenzhen Han's Motion Technology Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 110. Shenzhen Han's Motion Technology Strain Wave Gearing Devices Product Portfolios and Specifications

Table 111. Shenzhen Han's Motion Technology Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 112. Shenzhen Han's Motion Technology Main Business

Table 113. Shenzhen Han's Motion Technology Latest Developments

Table 114. Nidec-Shimpo Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors
Table 115. Nidec-Shimpo Strain Wave Gearing Devices Product Portfolios and Specifications
Table 116. Nidec-Shimpo Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 117. Nidec-Shimpo Main Business
Table 118. Nidec-Shimpo Latest Developments
Table 119. OVALO GmbH Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors
Table 120. OVALO GmbH Strain Wave Gearing Devices Product Portfolios and Specifications
Table 121. OVALO GmbH Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 122. OVALO GmbH Main Business
Table 123. OVALO GmbH Latest Developments
Table 124. TC Drive Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors
Table 125. TC Drive Strain Wave Gearing Devices Product Portfolios and Specifications
Table 126. TC Drive Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 127. TC Drive Main Business
Table 128. TC Drive Latest Developments
Table 129. Beijing CTKM Harmonic Drive Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors
Table 130. Beijing CTKM Harmonic Drive Strain Wave Gearing Devices Product Portfolios and Specifications
Table 131. Beijing CTKM Harmonic Drive Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 132. Beijing CTKM Harmonic Drive Main Business
Table 133. Beijing CTKM Harmonic Drive Latest Developments
Table 134. Hiwin Corporation Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors
Table 135. Hiwin Corporation Strain Wave Gearing Devices Product Portfolios and Specifications
Table 136. Hiwin Corporation Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 137. Hiwin Corporation Main Business
Table 138. Hiwin Corporation Latest Developments

Table 139. Reach Machinery Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 140. Reach Machinery Strain Wave Gearing Devices Product Portfolios and Specifications

Table 141. Reach Machinery Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 142. Reach Machinery Main Business

Table 143. Reach Machinery Latest Developments

Table 144. Sichuan TLIBOT Co.,Ltd. Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 145. Sichuan TLIBOT Co.,Ltd. Strain Wave Gearing Devices Product Portfolios and Specifications

Table 146. Sichuan TLIBOT Co.,Ltd. Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 147. Sichuan TLIBOT Co.,Ltd. Main Business

Table 148. Sichuan TLIBOT Co.,Ltd. Latest Developments

Table 149. Ningbo Zhongda Leader Intelligent Transmission Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 150. Ningbo Zhongda Leader Intelligent Transmission Strain Wave Gearing Devices Product Portfolios and Specifications

Table 151. Ningbo Zhongda Leader Intelligent Transmission Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 152. Ningbo Zhongda Leader Intelligent Transmission Main Business

Table 153. Ningbo Zhongda Leader Intelligent Transmission Latest Developments

Table 154. Wanshsin Seikou Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 155. Wanshsin Seikou Strain Wave Gearing Devices Product Portfolios and Specifications

Table 156. Wanshsin Seikou Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 157. Wanshsin Seikou Main Business

Table 158. Wanshsin Seikou Latest Developments

Table 159. Main Drive Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 160. Main Drive Strain Wave Gearing Devices Product Portfolios and Specifications

Table 161. Main Drive Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 162. Main Drive Main Business

Table 163. Main Drive Latest Developments

Table 164. KHGEARS Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 165. KHGEARS Strain Wave Gearing Devices Product Portfolios and Specifications

Table 166. KHGEARS Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 167. KHGEARS Main Business

Table 168. KHGEARS Latest Developments

Table 169. Guangzhou Haozhi Industrial Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 170. Guangzhou Haozhi Industrial Strain Wave Gearing Devices Product Portfolios and Specifications

Table 171. Guangzhou Haozhi Industrial Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 172. Guangzhou Haozhi Industrial Main Business

Table 173. Guangzhou Haozhi Industrial Latest Developments

Table 174. Too Eph Transmission Technology Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 175. Too Eph Transmission Technology Strain Wave Gearing Devices Product Portfolios and Specifications

Table 176. Too Eph Transmission Technology Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 177. Too Eph Transmission Technology Main Business

Table 178. Too Eph Transmission Technology Latest Developments

Table 179. Guohua Intelligent Equipment Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 180. Guohua Intelligent Equipment Strain Wave Gearing Devices Product Portfolios and Specifications

Table 181. Guohua Intelligent Equipment Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 182. Guohua Intelligent Equipment Main Business

Table 183. Guohua Intelligent Equipment Latest Developments

Table 184. Schaeffler Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 185. Schaeffler Strain Wave Gearing Devices Product Portfolios and Specifications

Table 186. Schaeffler Strain Wave Gearing Devices Sales (K Units), Revenue (\$

Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 187. Schaeffler Main Business

Table 188. Schaeffler Latest Developments

Table 189. BENRUN Robot Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 190. BENRUN Robot Strain Wave Gearing Devices Product Portfolios and Specifications

Table 191. BENRUN Robot Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 192. BENRUN Robot Main Business

Table 193. BENRUN Robot Latest Developments

Table 194. KOFON Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 195. KOFON Strain Wave Gearing Devices Product Portfolios and Specifications

Table 196. KOFON Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 197. KOFON Main Business

Table 198. KOFON Latest Developments

Table 199. GAM Enterprise Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 200. GAM Enterprise Strain Wave Gearing Devices Product Portfolios and Specifications

Table 201. GAM Enterprise Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 202. GAM Enterprise Main Business

Table 203. GAM Enterprise Latest Developments

Table 204. BHDI Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 205. BHDI Strain Wave Gearing Devices Product Portfolios and Specifications

Table 206. BHDI Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 207. BHDI Main Business

Table 208. BHDI Latest Developments

Table 209. SBB Tech Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 210. SBB Tech Strain Wave Gearing Devices Product Portfolios and Specifications

Table 211. SBB Tech Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 212. SBB Tech Main Business

Table 213. SBB Tech Latest Developments

Table 214. SPG Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 215. SPG Strain Wave Gearing Devices Product Portfolios and Specifications

Table 216. SPG Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 217. SPG Main Business

Table 218. SPG Latest Developments

Table 219. Jiangsu Guomao Reducer Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 220. Jiangsu Guomao Reducer Strain Wave Gearing Devices Product Portfolios and Specifications

Table 221. Jiangsu Guomao Reducer Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 222. Jiangsu Guomao Reducer Main Business

Table 223. Jiangsu Guomao Reducer Latest Developments

Table 224. Cone Drive Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 225. Cone Drive Strain Wave Gearing Devices Product Portfolios and Specifications

Table 226. Cone Drive Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 227. Cone Drive Main Business

Table 228. Cone Drive Latest Developments

Table 229. LI-MING Machinery Co., Ltd. Basic Information, Strain Wave Gearing Devices Manufacturing Base, Sales Area and Its Competitors

Table 230. LI-MING Machinery Co., Ltd. Strain Wave Gearing Devices Product Portfolios and Specifications

Table 231. LI-MING Machinery Co., Ltd. Strain Wave Gearing Devices Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 232. LI-MING Machinery Co., Ltd. Main Business

Table 233. LI-MING Machinery Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Strain Wave Gearing Devices

Figure 2. Strain Wave Gearing Devices Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Strain Wave Gearing Devices Sales Growth Rate 2021-2032 (K Units)

Figure 7. Global Strain Wave Gearing Devices Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Strain Wave Gearing Devices Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Strain Wave Gearing Devices Sales Market Share by Country/Region (2025)

Figure 10. Strain Wave Gearing Devices Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Cup Style

Figure 12. Product Picture of Hat Style

Figure 13. Product Picture of Pancake Style

Figure 14. Global Strain Wave Gearing Devices Sales Market Share by Type in 2026

Figure 15. Global Strain Wave Gearing Devices Revenue Market Share by Type (2021-2026)

Figure 16. Product Picture of ± 0.5 arcmin

Figure 17. Product Picture of 0.5 ± 1 arcmin

Figure 18. Product Picture of 1 ± 3 arcmin

Figure 19. Product Picture of Others

Figure 20. Global Strain Wave Gearing Devices Sales Market Share by Accuracy in 2026

Figure 21. Global Strain Wave Gearing Devices Revenue Market Share by Accuracy (2021-2026)

Figure 22. Product Picture of Direct Sales

Figure 23. Product Picture of Distribution

Figure 24. Global Strain Wave Gearing Devices Sales Market Share by Sales Channel in 2026

Figure 25. Global Strain Wave Gearing Devices Revenue Market Share by Sales Channel (2021-2026)

Figure 26. Strain Wave Gearing Devices Consumed in Industry Robot

Figure 27. Global Strain Wave Gearing Devices Market: Industry Robot (2021-2026) &

(K Units)

Figure 28. Strain Wave Gearing Devices Consumed in Semiconductor Equipment

Figure 29. Global Strain Wave Gearing Devices Market: Semiconductor Equipment (2021-2026) & (K Units)

Figure 30. Strain Wave Gearing Devices Consumed in Flat Panel Equipment

Figure 31. Global Strain Wave Gearing Devices Market: Flat Panel Equipment (2021-2026) & (K Units)

Figure 32. Strain Wave Gearing Devices Consumed in Machine Tools

Figure 33. Global Strain Wave Gearing Devices Market: Machine Tools (2021-2026) & (K Units)

Figure 34. Strain Wave Gearing Devices Consumed in Optical Machine

Figure 35. Global Strain Wave Gearing Devices Market: Optical Machine (2021-2026) & (K Units)

Figure 36. Strain Wave Gearing Devices Consumed in Printing, Bookbinding and Paper Machine

Figure 37. Global Strain Wave Gearing Devices Market: Printing, Bookbinding and Paper Machine (2021-2026) & (K Units)

Figure 38. Strain Wave Gearing Devices Consumed in Metal Working Machine

Figure 39. Global Strain Wave Gearing Devices Market: Metal Working Machine (2021-2026) & (K Units)

Figure 40. Strain Wave Gearing Devices Consumed in Medical Equipment

Figure 41. Global Strain Wave Gearing Devices Market: Medical Equipment (2021-2026) & (K Units)

Figure 42. Strain Wave Gearing Devices Consumed in Space Equipment

Figure 43. Global Strain Wave Gearing Devices Market: Space Equipment (2021-2026) & (K Units)

Figure 44. Global Strain Wave Gearing Devices Sale Market Share by Application (2025)

Figure 45. Global Strain Wave Gearing Devices Revenue Market Share by Application in 2025

Figure 46. Strain Wave Gearing Devices Sales by Company in 2025 (K Units)

Figure 47. Global Strain Wave Gearing Devices Sales Market Share by Company in 2025

Figure 48. Strain Wave Gearing Devices Revenue by Company in 2025 (\$ millions)

Figure 49. Global Strain Wave Gearing Devices Revenue Market Share by Company in 2025

Figure 50. Global Strain Wave Gearing Devices Sales Market Share by Geographic Region (2021-2026)

Figure 51. Global Strain Wave Gearing Devices Revenue Market Share by Geographic

Region in 2025

Figure 52. Americas Strain Wave Gearing Devices Sales 2021-2026 (K Units)

Figure 53. Americas Strain Wave Gearing Devices Revenue 2021-2026 (\$ millions)

Figure 54. APAC Strain Wave Gearing Devices Sales 2021-2026 (K Units)

Figure 55. APAC Strain Wave Gearing Devices Revenue 2021-2026 (\$ millions)

Figure 56. Europe Strain Wave Gearing Devices Sales 2021-2026 (K Units)

Figure 57. Europe Strain Wave Gearing Devices Revenue 2021-2026 (\$ millions)

Figure 58. Middle East & Africa Strain Wave Gearing Devices Sales 2021-2026 (K Units)

Figure 59. Middle East & Africa Strain Wave Gearing Devices Revenue 2021-2026 (\$ millions)

Figure 60. Americas Strain Wave Gearing Devices Sales Market Share by Country in 2025

Figure 61. Americas Strain Wave Gearing Devices Revenue Market Share by Country (2021-2026)

Figure 62. Americas Strain Wave Gearing Devices Sales Market Share by Type (2021-2026)

Figure 63. Americas Strain Wave Gearing Devices Sales Market Share by Application (2021-2026)

Figure 64. United States Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 65. Canada Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 66. Mexico Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 67. Brazil Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 68. APAC Strain Wave Gearing Devices Sales Market Share by Region in 2025

Figure 69. APAC Strain Wave Gearing Devices Revenue Market Share by Region (2021-2026)

Figure 70. APAC Strain Wave Gearing Devices Sales Market Share by Type (2021-2026)

Figure 71. APAC Strain Wave Gearing Devices Sales Market Share by Application (2021-2026)

Figure 72. China Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 73. Japan Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 74. South Korea Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 75. Southeast Asia Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 76. India Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 77. Australia Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 78. China Taiwan Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 79. Europe Strain Wave Gearing Devices Sales Market Share by Country in 2025

Figure 80. Europe Strain Wave Gearing Devices Revenue Market Share by Country (2021-2026)

Figure 81. Europe Strain Wave Gearing Devices Sales Market Share by Type (2021-2026)

Figure 82. Europe Strain Wave Gearing Devices Sales Market Share by Application (2021-2026)

Figure 83. Germany Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 84. France Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 85. UK Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 86. Italy Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 87. Russia Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 88. Middle East & Africa Strain Wave Gearing Devices Sales Market Share by Country (2021-2026)

Figure 89. Middle East & Africa Strain Wave Gearing Devices Sales Market Share by Type (2021-2026)

Figure 90. Middle East & Africa Strain Wave Gearing Devices Sales Market Share by Application (2021-2026)

Figure 91. Egypt Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 92. South Africa Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 93. Israel Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 94. Turkey Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 95. GCC Countries Strain Wave Gearing Devices Revenue Growth 2021-2026 (\$ millions)

Figure 96. Manufacturing Cost Structure Analysis of Strain Wave Gearing Devices in 2026

Figure 97. Manufacturing Process Analysis of Strain Wave Gearing Devices

Figure 98. Industry Chain Structure of Strain Wave Gearing Devices

Figure 99. Channels of Distribution

Figure 100. Global Strain Wave Gearing Devices Sales Market Forecast by Region (2027-2032)

Figure 101. Global Strain Wave Gearing Devices Revenue Market Share Forecast by Region (2027-2032)

Figure 102. Global Strain Wave Gearing Devices Sales Market Share Forecast by Type (2027-2032)

Figure 103. Global Strain Wave Gearing Devices Revenue Market Share Forecast by Type (2027-2032)

Figure 104. Global Strain Wave Gearing Devices Sales Market Share Forecast by Application (2027-2032)

Figure 105. Global Strain Wave Gearing Devices Revenue Market Share Forecast by Application (2027-2032)

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