

Global Tendon-driven Robotic Hands Market Growth 2026-2032

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Abstracts

The global Tendon-driven Robotic Hands market size is predicted to grow from US\$ 500 million in 2025 to US\$ 1903 million in 2032; it is expected to grow at a CAGR of 21.2% from 2026 to 2032.

Tendon-driven robotic hands are robotic manipulators that mimic the human hand by using cables or tendons (usually made of high-strength fibers) to transmit force from motors located away from the fingers. When the motors pull the tendons, the fingers bend or extend, enabling grasping and dexterous manipulation. This design reduces weight at the hand, improves flexibility, and allows more human-like motion. In 2025, global tendon-driven robotic hand production reached approximately 60,100 units, with an average global market price of around US\$ 8,500 per unit. Annual production capacity is 79,000 units. Gross Profit Margin: 48%. The industry chain of tendon-driven robotic hands is relatively specialized and vertically integrated. Upstream, key components include precision micro-motors, high-strength tendon cables (often UHMWPE or steel), miniature bearings, sensors (force/torque, position), and control chips. These components are supplied by advanced manufacturing and electronics companies, with cost and performance heavily influenced by actuator density and sensor integration. Midstream players focus on system integration, designing dexterous hand modules, optimizing tendon routing, control algorithms, and embedded systems. Downstream demand is driven by humanoid robots, industrial automation, prosthetics, and research platforms, where requirements differ significantly in reliability, cost, and dexterity. Currently, the value concentration is shifting from hardware manufacturing toward control software and system-level integration. Tendon-driven robotic hands represent one of the most promising yet technically challenging segments in robotics. While the current market size remains relatively small, the technology sits at the core of future humanoid and general-purpose robotic systems. In my view, the key inflection

point will not be purely mechanical innovation, but the convergence of low-cost actuation, robust control algorithms, and scalable manufacturing. Companies that can significantly reduce cost while maintaining sufficient dexterity (rather than maximizing DOF) will capture the largest market share. Over the next 5-10 years, the market is likely to transition from a research-driven niche to a commercially viable component ecosystem, especially as humanoid robots move toward real-world deployment.

United States market for Tendon-driven Robotic Hands is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Tendon-driven Robotic Hands is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Tendon-driven Robotic Hands is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Tendon-driven Robotic Hands players cover Schunk, Festo, SMC, Zimmer, Robotiq, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

This Insight Report provides a comprehensive analysis of the global Tendon-driven Robotic Hands 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 Tendon-driven Robotic Hands portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Tendon-driven Robotic Hands market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Tendon-driven Robotic Hands and breaks down the forecast by Structural Complexity, 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 Tendon-driven Robotic Hands.

This report presents a comprehensive overview, market shares, and growth opportunities of Tendon-driven Robotic Hands market by product type, application, key manufacturers and key regions and countries.

Segmentation by Structural Complexity:

Basic Gripper Hands

Anthropomorphic Hands

Highly Dexterous Hands

Segmentation by Degrees of Freedom:

Low DOF Hands: 2-6 DOF

Medium DOF Hands: 7-15 DOF

High DOF Hands: 16-25 DOF

Ultra-Dexterous Hands: 25+ DOF

Segmentation by Force / Grasping Capacity:

Light Manipulation Hands:

Standard Manipulation Hands: 5-20 N fingertip force

Heavy-Duty Robotic Hands: > 20 N fingertip force

Segmentation by Application:

Research / Academic

Industrial

Commercial

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.

Schunk

Festo

SMC

Zimmer

Robotiq

OnRobot A/S

Piab AB

Soft Robotics

RightHand Robotics

ABB

Inspire Robots

Agibot

Shadow Robot

Wonik Robotics

Tesla

Fourier Intelligence

Unitree Robotics

UBTECH Robotics Corp

Engineered Arts

Barrett Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global Tendon-driven Robotic Hands market?

What factors are driving Tendon-driven Robotic Hands market growth, globally and by region?

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

How do Tendon-driven Robotic Hands market opportunities vary by end market size?

How does Tendon-driven Robotic Hands break out by Structural Complexity, by Application?

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