

Global Embodied AI Market Size Study & Forecast, by Product (Robots, Exoskeleton, Autonomous Systems, Smart Appliances) and by Application (Healthcare, Automation & Manufacturing, Automotive, Logistics and Supply Chain, Defense and Security, Retail, Education, Other) and Regional Forecasts 2025–2035

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Abstracts

The Global Embodied AI Market is valued approximately at USD 3.02 billion in 2024 and is projected to grow at a CAGR of 15.22% over the forecast period 2025–2035. Embodied artificial intelligence (AI) refers to the integration of cognitive intelligence into physical entities—machines or robots—that interact intelligently with the environment. Unlike disembodied AI systems, embodied AI solutions are capable of perceiving, reasoning, and acting autonomously, bridging the gap between the digital and physical worlds. This field is expanding rapidly due to breakthroughs in robotics, computer vision, and natural language processing. The rising deployment of intelligent robots in industries, hospitals, retail stores, and even households is significantly propelling demand. Companies are investing heavily in R&D to develop more intuitive, adaptive, and context-aware systems capable of learning from physical experiences and human feedback. Moreover, the push toward automation, labor shortages in key industries, and the growing need for high-efficiency, precision-based operations are accelerating the adoption of embodied AI worldwide.

The rise of Industry 4.0 and advancements in edge computing, machine learning, and sensor technology have redefined how machines communicate and collaborate. The adoption of embodied AI has surged across logistics, manufacturing, and healthcare as enterprises strive for operational optimization. For instance, hospitals increasingly deploy humanoid robots for patient assistance, rehabilitation, and elderly care—tasks

that demand cognitive understanding and physical presence. Similarly, in manufacturing and logistics, AI-driven robots capable of autonomous decision-making and real-time environmental interaction are streamlining production and distribution networks. According to McKinsey, AI-driven automation could contribute over USD 15 trillion to the global economy by 2035, with embodied systems playing a pivotal role. However, high implementation costs and ethical concerns around autonomy, privacy, and workforce displacement remain potential restraints for market expansion. Nonetheless, continuous technological evolution and supportive regulatory frameworks are expected to create new frontiers for growth throughout the forecast horizon.

The detailed segments and sub-segments included in the report are:

By Product:

Robots

Exoskeleton

Autonomous Systems

Smart Appliances

By Application:

Healthcare

Automation & Manufacturing

Automotive

Logistics and Supply Chain

Defense and Security

Retail

Education

Other

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Robots Expected to Dominate the Market

Among all product categories, robots are expected to capture the largest share of the global embodied AI market throughout the forecast period. Their ability to combine sensory processing, adaptive learning, and motor control makes them indispensable in industrial and service-oriented applications. Collaborative robots, or cobots, have become the cornerstone of next-generation manufacturing by safely working alongside humans to enhance productivity and precision. In healthcare and retail, humanoid robots are improving service delivery and patient engagement. Furthermore, as hardware costs decline and AI algorithms become more energy-efficient, the scalability of robotic systems is increasing rapidly. The fusion of embodied cognition and robotic engineering continues to redefine operational standards across industries, positioning robots as the backbone of embodied AI integration.

Autonomous Systems Lead in Revenue Contribution

Autonomous systems currently generate the lion's share of revenue within the embodied AI landscape. From self-driving vehicles to intelligent drones and automated

warehouse fleets, these systems exemplify the convergence of AI decision-making and physical execution. Their capacity to analyze vast datasets in real-time, adapt to dynamic environments, and perform without direct human control has revolutionized industries reliant on mobility and logistics. The automotive and defense sectors, in particular, are investing heavily in autonomous platforms to improve safety, efficiency, and mission precision. Meanwhile, smart appliances and exoskeleton technologies are emerging subsegments that enhance human comfort and productivity, illustrating the broad and interconnected nature of embodied AI innovation.

The key regions considered for the Global Embodied AI Market study include North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. North America currently dominates the market due to its strong technological infrastructure, presence of leading AI developers, and rapid adoption of robotics and automation across industrial sectors. The U.S., in particular, remains a hub for AI research and commercialization, supported by large-scale investments from both private corporations and government initiatives. Europe follows closely, driven by its emphasis on ethical AI frameworks and applications in automotive manufacturing and healthcare robotics. However, the Asia Pacific region is anticipated to record the fastest growth rate during 2025–2035. Nations such as China, Japan, and South Korea are investing massively in AI-powered robotics for industrial automation and consumer applications, thereby positioning the region as a future epicenter of embodied AI development.

Major market players included in this report are:

Google DeepMind

Boston Dynamics

NVIDIA Corporation

Amazon Robotics

ABB Group

Samsung Electronics Co., Ltd.

Intel Corporation

Honda Motor Co., Ltd.

IBM Corporation

Sony Corporation

Microsoft Corporation

SoftBank Robotics Group Corp.

OpenAI

Universal Robots A/S

Siemens AG

Global Embodied AI Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial

aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained above.

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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