

Global Robotics AI Computer Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G628A5FD687FEN.html>

Date: August 2026

Pages: 191

Price: US\$ 4,480.00 (Single User License)

ID: G628A5FD687FEN

Abstracts

The global Robotics AI Computer market size is expected to reach \$ 2101 million by 2032, rising at a market growth of 19.5% CAGR during the forecast period (2026-2032).

A Robotics AI Computer is a high-performance embedded computing device deployed on robot bodies or in edge environments. It typically integrates heterogeneous processors, GPUs, NPUs, memory, storage, power management, thermal structures, high-speed networking, and multi-sensor interfaces into a complete system or board-level platform. It enables mobile robots, collaborative robots, humanoid robots, unmanned vehicles, drones, and industrial vision systems to perform visual perception, voice interaction, localization and mapping, path planning, behavior decision-making, defect inspection, and safety monitoring near the point of operation. Its core value lies in moving artificial intelligence inference from cloud or server infrastructure to the device side, thereby reducing latency, limiting data backhaul, improving privacy protection, and supporting offline operation. Through technology routes such as Jetson, x86 acceleration, ARM heterogeneous SoCs, discrete GPUs, and dedicated NPUs, it adapts to different requirements for computing power, power consumption, size, and reliability. Common product forms include development kits, embedded box computers, rugged fanless systems, waterproof and dustproof controllers, and rackmount edge nodes. The main customers include robot manufacturers, automation integrators, smart manufacturing enterprises, logistics and warehousing operators, security patrol organizations, medical robot developers, and research and education institutions. Business models mainly include hardware sales, custom design, volume supply, software toolchains, remote management, and integrated industry solutions.

Robotics AI computers are becoming a critical infrastructure layer for the robotics industry as it moves from automation control toward embodied intelligence. Traditional

robot control systems mainly emphasize motion control, signal acquisition, and deterministic execution, while next-generation robots must also handle visual recognition, 3D perception, speech understanding, path planning, anomaly detection, and behavior decision-making. Relying solely on cloud computing is increasingly insufficient for low latency, privacy protection, offline operation, and safety redundancy. As high-performance embedded GPUs, dedicated NPUs, heterogeneous SoCs, and edge software stacks mature, robotics AI computers are able to perform increasingly complex inference tasks on the robot body. By connecting cameras, radars, encoders, force sensors, and control buses through multi-sensor interfaces, they enable robots to achieve stronger environmental understanding and autonomous decision-making. The value of this product category is not merely additional computing power, but the tighter integration of perception, inference, and control inside robotic systems, supporting the transition of mobile robots, industrial robots, humanoid robots, unmanned vehicles, and intelligent inspection devices from predefined execution toward real-time scene adaptation.

The competitive focus of robotics AI computers is shifting from a single computing-performance metric to comprehensive engineering capability. Robot operating environments often involve limited space, power fluctuations, temperature variation, vibration, dust, humidity, and continuous operation requirements. As a result, products must balance computing power, power consumption, thermal design, interfaces, reliability, and software ecosystems. High-performance systems are suitable for humanoid robots, multi-camera perception, on-device large models, and complex multi-sensor fusion. Low-power products are suitable for small mobile robots, educational robots, and lightweight visual inference. Rugged fanless systems are suited to factories, warehouses, vehicles, and outdoor inspection scenarios. Multi-camera access, real-time networking, CAN bus connectivity, PoE power supply, GMSL transmission, wide-voltage input, and remote maintenance capabilities directly affect robot system design. In the future, industry segmentation will become more pronounced: platform companies will provide chips, software, and ecosystems; industrial computer vendors will provide reliable systems and interface adaptation; and system integrators will combine algorithms, sensors, and robot bodies around industry-specific scenarios.

From a market development perspective, robot AI computers are positioned at the convergence of edge AI, industrial computing, and the robotics industry. Demand is mainly driven by the need for robot bodies, mobile platforms, and unmanned systems to upgrade capabilities such as perception computing, on-device inference, multi-sensor fusion, localization and navigation, motion planning, and task scheduling. As manufacturing automation, warehouse logistics robots, humanoid robots, autonomous

vehicles, intelligent inspection systems, and on-device generative AI applications continue to advance, procurement demand is expected to move gradually from R&D validation and prototype adoption toward pilot deployment and scaled implementation. Customer priorities will also expand from computing performance alone to broader requirements such as long-term supply, industrial-grade stability, hardware-software compatibility, remote maintenance, system security, and global certification. On the supply side, U.S. AI computing platform providers, Taiwanese industrial computer manufacturers, mainland Chinese edge AI hardware companies, Japanese industrial automation vendors, and South Korean AI chip companies are expected to jointly drive product evolution, while demand is likely to be stronger in regions with mature robotics supply chains, higher levels of automation, stronger labor substitution needs, and an established foundation for smart manufacturing and unmanned system applications.

This report studies the global Robotics AI Computer demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Robotics AI Computer, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Robotics AI Computer that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Robotics AI Computer total market, 2021-2032, (USD Million)

Global Robotics AI Computer total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Robotics AI Computer total market, key domestic companies, and share, (USD Million)

Global Robotics AI Computer revenue by player, revenue and market share 2021-2026, (USD Million)

Global Robotics AI Computer total market by Computing Power Level, CAGR, 2021-2032, (USD Million)

Global Robotics AI Computer total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Robotics AI Computer market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of

this study include NVIDIA Corporation, Advantech Co., Ltd., AAEON Technology Inc., ADLINK Technology Inc., Neousys Technology Inc., Vecow Co., Ltd., Cincoze Co., Ltd., DFI Inc., IEI Integration Corp., NEXCOM International Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Robotics AI Computer market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Computing Power Level, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Robotics AI Computer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Robotics AI Computer Market, Segmentation by Computing Power Level:

Micro-Power Entry-Level Robotics AI Computer

Low-Power Mainstream Robotics AI Computer

High-Performance Multi-Sensor Robotics AI Computer

Edge Generative AI Robotics AI Computer

Global Robotics AI Computer Market, Segmentation by Deployment Form:

Board-Level Development Kit Robotics AI Computer

Embedded Box Robotics AI Computer

Rugged Fanless Robotics AI Computer

Waterproof and Dustproof Robotics AI Computer

Rackmount Edge Robotics AI Computer

Other

Global Robotics AI Computer Market, Segmentation by Sensor Interface:

General Camera Access Robotics AI Computer

Industrial Ethernet Camera Access Robotics AI Computer

Automotive Serial Camera Access Robotics AI Computer

Fieldbus Control Access Robotics AI Computer

Multimodal High-Speed Network Access Robotics AI Computer

Other

Global Robotics AI Computer Market, Segmentation by Application:

Mobile Robot Navigation Perception

Industrial Robot Visual Inspection

Humanoid Robot Multimodal Interaction

Unmanned Vehicle Edge Autonomy

Medical Robot Real-Time Assistance

Other

Companies Profiled:

NVIDIA Corporation

Advantech Co., Ltd.

AAEON Technology Inc.

ADLINK Technology Inc.

Neousys Technology Inc.

Vecow Co., Ltd.

Cincoze Co., Ltd.

DFI Inc.

IEI Integration Corp.

NEXCOM International Co., Ltd.

ASUSTeK Computer Inc.

Axiomtek Co., Ltd.

IBASE Technology Inc.

ACROSSER Technology Co., Ltd.

Portwell Inc.

EVOC Intelligent Technology Co., Ltd.

Shenzhen NORCO Intelligent Technology Co., Ltd.

Seed Technology Co., Ltd.

CONTEC Co., Ltd.

RT Corporation

SECO S.p.A.

Eurotech S.p.A.

Kontron AG

Connect Tech Inc.

Premio Inc.

OnLogic Inc.

Dell Technologies Inc.

Hewlett Packard Enterprise Company

Lenovo Group Limited

Super Micro Computer, Inc.

Qualcomm Incorporated

Intel Corporation

Advanced Micro Devices, Inc.

Hailo Technologies Ltd.

DEEPX Co., Ltd.

Key Questions Answered

1. How big is the global Robotics AI Computer market?
2. What is the demand of the global Robotics AI Computer market?
3. What is the year over year growth of the global Robotics AI Computer market?
4. What is the total value of the global Robotics AI Computer market?
5. Who are the Major Players in the global Robotics AI Computer market?
6. What are the growth factors driving the market demand?

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