

Global Robotics Foundation Model Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Robotics Foundation Model market size was valued at US\$ 329 million in 2025 and is forecast to a readjusted size of US\$ 6921 million by 2032 with a CAGR of 53.7% during review period.

A robotics foundation model is a general-purpose artificial intelligence base layer for physical robots to perceive, understand, plan, and execute actions. Its core purpose is to overcome the limited generalization of traditional robotics systems that rely on fixed programming, single-scenario training, and tight coupling with specific hardware. These models typically integrate vision, language, state, tactile, trajectory, video, and simulation data, using large-scale pretraining, imitation learning, reinforcement learning, diffusion policies, action tokenization, world modeling, and few-shot fine-tuning to convert environmental observations, task intent, and robot embodiment states into executable actions, step-by-step plans, or low-level control interfaces. Typical applications include warehouse picking, industrial assembly, home services, mobile inspection, healthcare assistance, commercial interaction, research and education, and hazardous-environment operations. Key customers include robot OEMs, automation integrators, logistics companies, manufacturers, AI development platforms, and research institutions. Delivery formats include open-weight models, development frameworks, SDKs, datasets, cloud APIs, on-device inference models, private deployments, simulation training pipelines, and commercial solutions bundled with robotic embodiments. Competition is shifting from isolated algorithmic performance toward cross-embodiment generalization, safety constraints, data flywheels, and real-world deployment efficiency.

Robotics foundation models are becoming the core layer that enables the robotics industry to move from automated equipment toward general-purpose physical intelligence systems. Traditional robotics software was built around fixed workcells, fixed materials, fixed trajectories, and deterministic control, with deployment heavily dependent on engineering tuning, high scenario-transfer costs, and weak coverage of long-tail tasks. New-generation robotics foundation models integrate vision, language, state, trajectory, video, and simulation data into a unified training stack, connecting natural-language understanding, spatial perception, task planning, and action generation. This allows robots to generalize more effectively across new objects, instructions, environments, and embodiments. The leading technical routes include vision-language-action models, embodied reasoning models, behavior policy models, world models, and cross-embodiment control models. Vision-language-action models are closest to commercial deployment, embodied reasoning models are suited for long-horizon task planning, and world models and simulation platforms help expand training data while reducing the cost of real-world data collection. As on-device inference, few-shot fine-tuning, action tokenization, and safety constraints mature, the value of robotics foundation models will shift from research demonstrations to reusable capability assets in industrial, warehouse, service, and home scenarios.

The competitive focus of robotics foundation models is shifting from model parameter scale to data flywheels, deployment toolchains, and real-task success rates. Robot models cannot fully replicate the scaling path of internet-scale text and image foundation models because real physical interaction data is expensive to collect, multimodal in nature, difficult to label for actions, exposed to safety risks, and highly dependent on robot embodiment differences. Therefore, companies with robot operation data, simulation generation capabilities, human video understanding, cross-embodiment data alignment methods, and continuous feedback mechanisms are more likely to build lasting barriers. Open-source models and development frameworks will lower the threshold for research and secondary development, while closed commercial models can monetize through robot embodiments, SDKs, cloud services, private deployments, and industry solutions. Customers will not simply purchase model weights; they will procure complete platforms that include data collection, simulation training, model fine-tuning, deployment optimization, safety evaluation, and task monitoring. Manufacturing and warehouse scenarios will generate revenue first because they offer high task frequency, measurable results, clear return on investment, and stronger potential for building data flywheels.

The global supply structure shows U.S. leadership, accelerating Chinese participation, and specialized breakthroughs in Japan and South Korea. U.S. companies lead in

foundation models, GPU computing, robot learning frameworks, open-source ecosystems, and startup financing, covering humanoids, robotic arms, warehouse picking, generalist policies, on-device models, and development platforms. Chinese companies have strengths in robot manufacturing, supply chains, industrial scenarios, and policy support, and are combining humanoid robot production, embodied datasets, foundation models, and development platforms into a vertically integrated path from hardware to intelligence. Japanese companies focus more on home assistance, dexterous manipulation, and reliability evaluation, while South Korean companies have distinctive capabilities in service robotics, navigation, urban spatial intelligence, and real-world robotics research. Demand will first expand from manufacturing, logistics, and research customers in North America and China to Europe, Japan, South Korea, and Southeast Asia. Long-term growth will depend on whether models can complete multi-step tasks reliably under safety constraints and convert every deployment into data that improves the next generation of model capability.

This report is a detailed and comprehensive analysis for global Robotics Foundation Model market. Both quantitative and qualitative analyses are presented by company, by region & country, by Model Architecture and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Robotics Foundation Model market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Robotics Foundation Model market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Robotics Foundation Model market size and forecasts, by Model Architecture and by Application, in consumption value (\$ Million), 2021-2032

Global Robotics Foundation Model market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Robotics Foundation Model

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Robotics Foundation Model 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, Alphabet Inc., Covariant, Physical Intelligence, Skild AI, Figure AI, Inc., Generalist AI, Inc., Hugging Face, Inc., Field AI, Inc., Dyna Robotics, Inc., etc.

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

Market segmentation

Robotics Foundation Model market is split by Model Architecture and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Model Architecture and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Model Architecture

Vision-Language-Action Robotics Foundation Model

Embodied Reasoning Robotics Foundation Model

World Model Robotics Foundation Model

Behavior Policy Robotics Foundation Model

Cross-Embodiment Control Robotics Foundation Model

Tool-Orchestration Robotics Foundation Model

Other

Market segment by Deployment Location

Cloud Robotics Foundation Model

Edge Robotics Foundation Model

On-Device Robotics Foundation Model

Simulation-Environment Robotics Foundation Model

Cloud-Edge-Device Collaborative Robotics Foundation Model

Development-Platform-Hosted Robotics Foundation Model

Other

Market segment by Control Object

Humanoid Robotics Foundation Model

Dual-Arm Robotics Foundation Model

Single-Arm Robotics Foundation Model

Quadruped Robotics Foundation Model

Mobile-Manipulation Robotics Foundation Model

Navigation Robotics Foundation Model

Other

Market segment by Application

Warehouse Picking and Sorting

Industrial Assembly Operations

Home Service Execution

Commercial Service Interaction

Research and Education Development

Mobile Inspection and Navigation

Medical Care Assistance

Hazardous-Environment Operations

Other

Market segment by players, this report covers

NVIDIA Corporation

Alphabet Inc.

Covariant

Physical Intelligence

Skild AI

Figure AI, Inc.

Generalist AI, Inc.

Hugging Face, Inc.

Field AI, Inc.

Dyna Robotics, Inc.

1X Technologies

Sunday Inc.

Sanctuary AI Inc.

Genesis AI

Agility Robotics, Inc.

Agile Robots SE

RLWRD Inc.

NAVER Corporation

Tencent Holdings Limited

Xiaomi Corporation

AGIBOT Innovation (Shanghai) Technology Co., Ltd.

X Square Robot

Alibaba Group Holding Limited

Ant Group Co., Ltd.

UBTECH Robotics Corp Ltd

Spirit AI

Galbot

PsiBot

DeepCybo

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Robotics Foundation Model product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Robotics Foundation Model, with revenue, gross margin, and global market share of Robotics Foundation Model from 2021 to 2026.

Chapter 3, the Robotics Foundation Model competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Model Architecture and by Application, with consumption value and growth rate by Model Architecture, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Robotics Foundation Model market forecast, by regions, by Model Architecture and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Robotics Foundation Model.

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