

Global Robotics Foundation Model Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Robotics Foundation Model market size is expected to reach \$ 6921 million by 2032, rising at a market growth of 53.7% CAGR during the forecast period (2026-2032).

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 studies the global Robotics Foundation Model demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Robotics Foundation Model, 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 Foundation Model that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Robotics Foundation Model total market, 2021-2032, (USD Million)

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

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

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

Global Robotics Foundation Model total market by Model Architecture, CAGR, 2021-2032, (USD Million)

Global Robotics Foundation Model total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major 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.

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

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Model Architecture, 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 Foundation Model Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Robotics Foundation Model Market, Segmentation 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

Global Robotics Foundation Model Market, Segmentation 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

Global Robotics Foundation Model Market, Segmentation 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

Global Robotics Foundation Model Market, Segmentation 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

Companies Profiled:

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

RLWRLD 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

Key Questions Answered

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

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