

# Global Second Generation Humanoid Robot Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Second Generation Humanoid Robot market size is expected to reach \$ 9543 million by 2032, rising at a market growth of 48.8% CAGR during the forecast period (2026-2032).

The second-generation humanoid robot represents an evolved form in which motion control, sensor fusion, and autonomous decision-making have been elevated to a level of practical operational viability. Its key breakthrough lies in moving beyond pre-programmed sequences or remote teleoperation for single actions, instead achieving multi-task adaptability and dynamic fault tolerance in unstructured environments through an end-to-end perception-planning-execution loop. The design rationale for this generation is to equip the machine with the ability to work continuously in real physical spaces and handle unexpected disturbances autonomously, rather than merely serving as a sample demonstrating technical feasibility. Its fundamental value is to establish a reliable motion and manipulation platform, by reducing dependence on structured environments and lowering the barrier to human-robot interaction, thereby laying the groundwork for humanoid robots to operate in everyday production and living contexts. In 2025, global Second Generation Humanoid Robot production reached approximately 6694 units with an average global market price of around k US\$85 per unit.

The second-generation humanoid robot industry is undergoing a critical transition from concept validation to small-batch delivery. The core characteristic of this product category lies in the integration of multimodal perception fusion and whole-body coordinated motion control capabilities, which has significantly altered the overall cost structure of the machine. Tesla emphasized at its 2024 shareholder meeting that its second-generation Optimus has already completed trial tasks such as battery sorting inside factories, indicating that enterprise revenue focus is shifting from demonstrating

prototypes to signing scenario-specific adaptation contracts after functional validation. Meanwhile, official news from companies such as Fourier Intelligence and Unitree shows that second-generation products widely adopt self-developed integrated joints to replace purchased solutions in their joint modules. This directly shifts the profit pool from the cost-reduction phase of upstream component procurement to the premium phase of self-developed actuators and algorithm software.

The Ministry of Industry and Information Technology has designated humanoid robots as a core carrier for future industrial innovation and development, and encourages whole-machine companies in relevant policy documents to prioritize breakthroughs in motion control and scenario generalization capabilities. This guidance leads companies to invest more profits into building motion control algorithm teams and deploying simulation platforms, rather than continuing to expand traditional machining capacity. On the demand side, companies such as BYD and Foxconn mentioned in their annual reports that they see the potential for the second batch of validation machines to replace human labor in high-frequency standardized operations. However, the profit recovery cycle is significantly longer than that of traditional automation equipment, making them more inclined to adopt a per-use leasing model combined with long-term service contract revenue sharing. Huawei and CATL, on the other hand, bypass competition in whole-machine manufacturing by investing in motion control chip and force sensor startups. Their public announcements indicate that they value the zero-shot operational data brought by second-generation humanoid robots more highly. In summary, the profit structure of the second-generation humanoid robot industry is shifting from one-time hardware manufacturing sales to a balance of continuous algorithm iteration fees and data service revenue sharing. Companies that first achieve cross-scenario generalization capabilities will redraw the profit distribution of the industrial chain through software licensing.

This report studies the global Second Generation Humanoid Robot production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Second Generation Humanoid Robot 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 Second Generation Humanoid Robot that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Second Generation Humanoid Robot total production and demand, 2021-2032,

(Units)

Global Second Generation Humanoid Robot total production value, 2021-2032, (USD Million)

Global Second Generation Humanoid Robot production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Second Generation Humanoid Robot consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Second Generation Humanoid Robot domestic production, consumption, key domestic manufacturers and share

Global Second Generation Humanoid Robot production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Second Generation Humanoid Robot production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Second Generation Humanoid Robot production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Second Generation Humanoid Robot market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include SKL Robotics, 1X Technologies, Figure AI, Rainbow Robotics, Reflex Robotics, AgiBot Innovation (Shanghai) Technology, Shenzhen UBTECH Robotics, Hangzhou Yushu Science And Technology, Leju (Shenzhen) Robotics, Suzhou Junji Robot Technology, 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 Second Generation Humanoid Robot market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, 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 Second Generation Humanoid Robot Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Second Generation Humanoid Robot Market, Segmentation by Type:

Wheeled Humanoid Robot

Bipedal Humanoid Robot

Global Second Generation Humanoid Robot Market, Segmentation by DoF:

?15 DoF

15?25 DoF

26?40 DoF

?40 DoF

Global Second Generation Humanoid Robot Market, Segmentation by End Effector:

Dexterous Hand

Gripper

Global Second Generation Humanoid Robot Market, Segmentation by Application:

Industrial Manufacturing

Warehousing and Logistics

Business Services

Home Services

Scientific Research

Medical and Health Care

Leisure and Entertainment

Others

Companies Profiled:

SKL Robotics

1X Technologies

Figure AI

Rainbow Robotics

Reflex Robotics

AgiBot Innovation (Shanghai) Technology

Shenzhen UBTECH Robotics

Hangzhou Yushu Science And Technology

Leju (Shenzhen) Robotics

Suzhou Junji Robot Technology

Suzhou UniX AI

Guangzhou Li-Gong Industrial

Chengdu Crp ROBOT Technology

GAC Group

Shenzhen Elephant Robotics Technology

Beijing Robotera

ROKAE Robotics

Beijing Galbot

Variable Robotics Technology (Shenzhen)

#### Key Questions Answered:

1. How big is the global Second Generation Humanoid Robot market?
2. What is the demand of the global Second Generation Humanoid Robot market?
3. What is the year over year growth of the global Second Generation Humanoid Robot market?
4. What is the production and production value of the global Second Generation Humanoid Robot market?
5. Who are the key producers in the global Second Generation Humanoid Robot market?
6. What are the growth factors driving the market demand?

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