

Global Robotics AI Computer Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/G0215D1F0740EN.html>

Date: October 2026

Pages: 182

Price: US\$ 3,660.00 (Single User License)

ID: G0215D1F0740EN

Abstracts

The global Robotics AI Computer market size is predicted to grow from US\$ 567 million in 2025 to US\$ 2122 million in 2032; it is expected to grow at a CAGR of 20.7% from 2026 to 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.

LPI (LP Information)' newest research report, the "Robotics AI Computer Industry Forecast" looks at past sales and reviews total world Robotics AI Computer sales in 2025, providing a comprehensive analysis by region and market sector of projected Robotics AI Computer sales for 2026 through 2032. With Robotics AI Computer sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Robotics AI Computer industry.

This Insight Report provides a comprehensive analysis of the global Robotics AI Computer landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Robotics AI Computer portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Robotics AI Computer market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Robotics AI Computer and breaks down the forecast by Computing Power Level, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Robotics AI Computer.

This report presents a comprehensive overview, market shares, and growth opportunities of Robotics AI Computer market by product type, application, key players

and key regions and countries.

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

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

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

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

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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.

Seeed 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.

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