

TOP 15 EMERGING LEADERS: **HUMANOID ROBOTS**

TO WATCH IN 2026



CHOZAN

BY ASHLEY DUDARENOK

ABOUT CHOZAN

Founded in 2016, ChoZan is an immersive corporate education, research, and digital transformation firm with offices in Hong Kong, Shenzhen, and Shanghai. We help global Fortune 1000 companies understand how China is evolving — and what they can learn from it.

China is the world's most advanced digital market. We help senior leaders experience it firsthand, learn from it directly, and apply those insights to their own transformation journeys.

WHAT WE DO

CHINA LEARNING EXPEDITIONS & INNOVATION TOURS

Our tailored study tours take teams inside China's leading tech giants, startups, and innovation hubs. Participants gain firsthand exposure to AI, robotics, smart retail, and other cutting-edge developments — and return with actionable insights to drive their own transformation. We've worked with companies including Coca-Cola, Deckers, and Disney.

KEYNOTES, WORKSHOPS & BOARDROOM BRIEFINGS

Our founder, Ashley Dudarenok, is a globally recognized China digital expert and bestselling author. Her dynamic keynotes and executive briefings cover topics such as digital disruption, innovation, applied technologies, and the new retail. We've upskilled teams at companies such as 3M, Shiseido, MTN, and Bank of America.

CHINA INNOVATION RESEARCH & TREND WATCHING

We deliver data-backed, culturally informed research that decodes Chinese innovations, business models, consumer behavior, and market dynamics. Our clients include HSBC, Johnson & Johnson, Crocs, Adobe, and others.

CONSULTING & EXPERT DIALOGS

We offer one-on-one consultations with industry insiders and thought leaders embedded in China's fast-moving innovation ecosystem. Whether you need guidance on platform strategy, technology benchmarking, or navigating competitive dynamics, we connect you with the right expertise at the right time. We've provided strategic insights to brands such as Colgate-Palmolive, DFS, and Planet.

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HELLO!

As we move through 2026, the momentum is only accelerating. This year is being shaped by deeper AI agent integration, intensifying competition, and a new wave of companies scaling breakthroughs from labs to the streets—and in the case of humanoid robotics, from factory floors into real-world operations. Now is the time to understand who led in 2025—and who is best positioned to win in the years ahead.

This report is your guide to the 15 companies shaping the humanoid robotics landscape today. We profile the most impactful players across China, the United States, Canada, Germany, and Norway, giving you a clear view of where the momentum is heading and what comes next.

Thank you for joining us on this journey. Let's go meet them.



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01

INTRODUCTION: HUMANOID ROBOTS TRANSITION FROM DEMOS TO REAL DEPLOYMENTS IN 2026

Key Sectors Embracing Humanoids

ROI and Workforce Impact

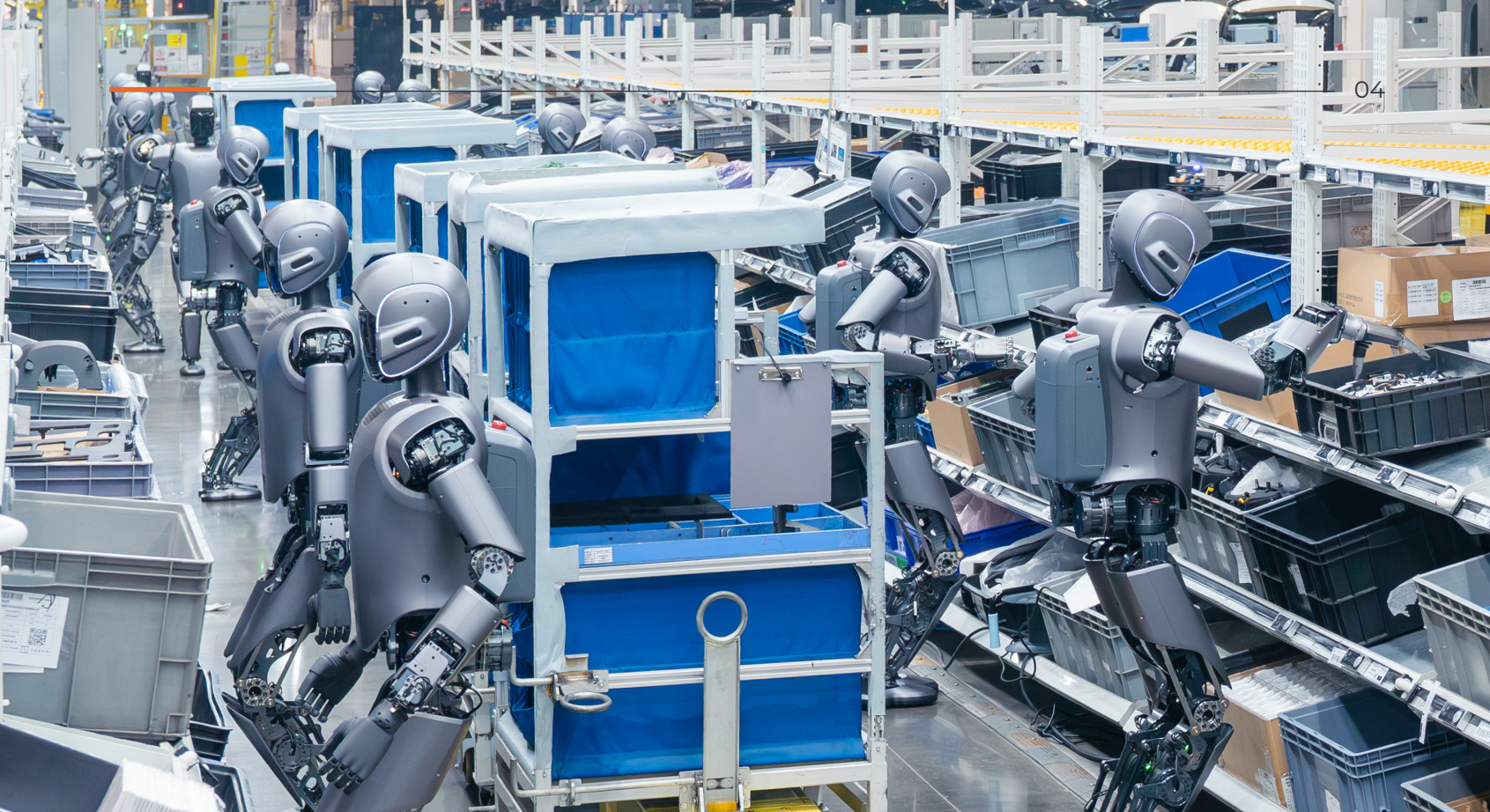
EMERGING LEADERS: HUMANOID ROBOTS TO WATCH IN 2026

In 2026, humanoid robots are transitioning from flashy demos to real deployments. After years of R&D, this is the year humanoids step onto factory floors and warehouse aisles, assist caregivers in eldercare homes, greet customers in retail, and tackle hazardous jobs. Demographics and economics are driving this shift – with aging workforces and persistent labor shortages, companies see humanoids as part of the solution.

Unlike fixed automation, humanoids offer **human-like mobility and dexterity**, letting them work in environments designed for people (climb stairs, turn doorknobs, handle tools) without expensive retooling.

This anthropomorphic adaptability means a humanoid can take on tasks in **logistics, manufacturing, healthcare, retail, and dangerous sites** that previously needed a human's form factor.





1.1

KEY SECTORS EMBRACING HUMANOIDS

Logistics and warehouse operations are a natural beachhead. Humanoids can autonomously lift and move boxes, unload trucks, and navigate aisles that wheeled robots struggle to navigate. Manufacturing lines are experimenting with bipedal bots for machine tending, parts delivery, and quality inspection alongside human workers.

In retail, humanoid greeters and inventory clerks are being piloted in stores and shopping malls in Asia and the U.S., where they attract shoppers and automate routine customer interactions (such as guiding customers to products).

Eldercare and healthcare robotics are also advancing – humanoids are assisting staff in eldercare facilities by carrying items, monitoring residents, or just providing companionship with conversational AI.

And critically, **hazardous and dirty jobs** are a target: several projects are sending humanoids into environments too risky for people, such as disaster response, chemical plants, and high-temperature industrial sites.

For instance, a Chinese startup recently unveiled a full-size humanoid with an IP66 waterproof/dustproof rating specifically to operate outdoors in rain and heat. While robots today still lack human-level speed and flexibility and are confined to niche applications, their potential in demanding or dangerous roles is already validated. According to multiple brokerages and investment institutions, 2026 will be the pivotal year when humanoids move from innovation to large-scale commercialization.



1.2

ROI AND WORKFORCE IMPACT

Executives are paying attention because the cost/benefit equation is finally improving. The price tags of humanoids, once well over \$250,000, are starting to fall with new designs and scaled production.

Chinese firms like Unitree are selling full-size humanoids for under \$100k, and some U.S. startups are targeting the \$50k range in the next couple of years – figures that make a humanoid’s \$8–\$15 per hour operating cost competitive with human wages in many markets.

At the same time, reliability is up: improved actuators and better battery solutions (such as fast-swap packs) mean robots can work longer hours with less downtime. Companies are also recognizing the flexibility humanoids offer – a single general-purpose robot can perform many different jobs through software updates, rather than single-task fixed automation.

In 2026, early adopters have begun validating humanoids as a means to future-proof operations. These robots are now addressing structural labor gaps, enabling rapid scaling during demand surges, and absorbing physically demanding or repetitive tasks—freeing human employees to focus on higher-value responsibilities.

In short, the stage is set for humanoid robots to move from intriguing demos to strategic assets in the workforce.

02

CHINA'S ROBOTICS DOMINANCE: SHENZHEN- HAN GZHOU AND THE FAST FEEDBACK MACHINE

Why Global Enterprises Must Pay
Attention

CHINA'S ROBOTICS DOMINANCE: SHENZHEN-HANGZHOU AND THE FAST FEEDBACK MACHINE

China has rapidly become the world's powerhouse in robotics – both in scale and speed of innovation. According to data released by China's National Bureau of Statistics on March 16, 2026, the country produced 143,608 sets of industrial robots in the first two months of the year, representing a 31.1% year-on-year increase compared to the same period in 2025. This growth rate outpaces the 27% increase recorded during the same period last year, when production totaled 91,088 sets. For the full year of 2025, industrial robot production reached 773,074 sets, a 28% increase compared to the previous year.

Two major tech hubs, Shenzhen in the south and Hangzhou in the east, anchor China's humanoid revolution. Shenzhen (often dubbed “the Silicon Valley of hardware”) is home to companies like UBTECH, Tencent-backed AgiBot, and Engineered Arts' Chinese partners – all churning out new humanoid prototypes in months.

Hangzhou, supported by nearby Shanghai and the presence of the e-commerce giant Alibaba, hosts companies such as Unitree and Deep Robotics.

These hubs benefit from dense supply chains for motors, sensors, batteries, and manufacturing expertise. A humanoid that might take a Western startup 18 months to iterate can often be revised in 3–6 months in Shenzhen, thanks to parts suppliers and contract manufacturers clustered next door.

Robotics firms can redesign components, update software, and validate performance quickly because suppliers, engineers, and deployment partners operate in close coordination.

Supply chain density strengthens this advantage. Access to motors, sensors, batteries, and embedded computing reduces cost and shortens production timelines. Robotics companies benefit from components already scaled across electric vehicles and industrial automation. This structure lowers deployment risk and accelerates learning through real-world use.

Artificial intelligence integration further differentiates China's approach. Robotics developers embed advanced reasoning models into control systems to improve task planning and adaptability. These models help robots handle variability without rigid scripting. As a result, humanoids perform more consistently across sites and tasks, which increases enterprise confidence.

WHY GLOBAL ENTERPRISES MUST PAY ATTENTION

Global firms should pay attention because the economics and deployment logic of humanoid robots are changing rapidly. Hardware costs are falling with scale, reliability is improving through real-world operation, and commercial models are shifting to service-based structures that lower upfront investment. As China's Commerce Minister noted at the Two Sessions, China is the gym where enterprises stay globally competitive. Nowhere is this more evident than in robotics, where the country offers unmatched scale, speed, and application-ready environments.

Humanoid robots integrate easily into existing facilities, enabling incremental automation aligned with real operational constraints. This allows enterprises to test value, refine use cases, and scale selectively. Engaging with China's robotics ecosystem provides global firms not just access to advanced hardware, but the competitive edge needed to keep pace with the world's fastest-moving automation market.



CHINA INNOVATION TOURS

CURIOUS ABOUT WHAT'S NEXT?
COME SEE IT FIRSTHAND.

This report gives you the names. Our tour put you in the room. Visit China's top tech companies. Experience the technology up close. Sit down with the leaders and experts driving real breakthroughs.



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YOUR TEAM**



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03

THE HUMANOID ROBOTICS LEADERBO ARD (2026)

These are listed in alphabetical order

1X Technologies (Norway / USA)

NEO Beta

Agibot (Shanghai China)

A2 Humanoid Robot

Agility Robotics (USA)

Digit

Boston Dynamics (USA)

Electric Atlas

Deep Robotics (Hangzhou China)

DR02 Industrial Humanoid

EngineAI (Shenzhen China)

PM01 / SE01 / T800

Fourier Intelligence (Shanghai China)

GR-3 Care-Bot

Galbot (Beijing China)

Galbot G1 Humanoid Robot

KEYi Robotics (Beijing China)

Loona AI Companion Robot

NEURA Robotics (Germany)

4NE-1 Cognitive Humanoid

Sanctuary AI (Canada)

Phoenix

Tesla (USA)

Optimus

UBTECH Robotics (Shenzhen China)

Walker S2

Unitree Robotics (Hangzhou China)

G1 Humanoids

XPENG Robotics (Guangzhou China)

IRON & Next-Gen IRON

THE HUMANOID ROBOTICS LEADERBOARD (2026)

Here are 15 leading organizations that are shaping the humanoid robot landscape. Each has recently unveiled significant humanoid models or advancements. We'll cover what's innovative about their approach, why it matters strategically, and their commercial traction or deployments to date.

These “humanoid pioneers” span the globe – from China’s fast-moving startups to America’s research powerhouses and beyond. They are the ones to watch as humanoids transition from prototypes to work-ready products.

	IX Technologies NEO Beta Humanoid Robot		Agibot A2 Humanoid Robot
	Agility Robotics Digit Bipedal Robot		Boston Dynamics Electric Atlas
	Deep Robotics DR02 Industrial Humanoid		EngineAI PM01 & SE01 Humanoid Platforms
	Fourier Intelligence GR-3 Care-Bot		Galbot GALBOT G1 Humanoid Robot
	KEYi Robotics Loona AI Companion Robot		NEURA Robotics 4NE-1 Cognitive Humanoid
	Sanctuary AI Phoenix General-Purpose Humanoid Robot		Tesla Optimus Humanoid Robot
	UBTECH Robotics Walker S2		Unitree Robotics G1 Humanoids
	XPENG Robotics IRON & Next-Gen IRON		

3.1

1X TECHNOLOGIES (NORWAY / USA) NEO BETA HUMANOID ROBOT

1X Technologies is a Norway-founded humanoid robotics company with operations in the United States. The company focuses on safe, general-purpose humanoids designed for everyday human environments. NEO Beta is 1X's prototype humanoid explicitly built for home use.



WHAT'S COOL

NEO Beta is designed for safe operation inside real homes. The robot emphasizes bio-inspired motion and soft physical interaction.

Key characteristics include:

- ✓ **Home-first design:** built for domestic spaces, not factories.
- ✓ **Bio-inspired structure:** avoids rigid, industrial robot mechanics.
- ✓ **Safety-centric philosophy:** engineered to work closely with people.
- ✓ **Bipedal humanoid form:** enables navigation of human-designed environments.
- ✓ **Scalable manufacturing:** designed for production at 1X's Norway factory.

NEO Beta prioritizes physical safety over speed or payload. Its design avoids aggressive motion or heavy industrial tasks.

WHY IT MATTERS

1X could be the first to deploy humanoid robots in private homes at scale, driven by its partnership with OpenAI and a human-centric approach to solving the AI challenges of home use, including understanding unstructured human environments and commands. Its January 2026 World Model enables NEO to learn from internet video and convert natural language prompts into physical actions without task-specific programming.

1X is planning limited in-home trials and deliveries in 2026, marking a watershed moment: humanoids not just on factory floors but living with people. This has broad implications—from altering care for older people (helping people live independently longer) to introducing new consumer tech markets (a home robot akin to a car or appliance in cost).

For businesses, 1X's tech has already found commercial traction beyond home use. In December 2025, 1X announced a strategic partnership with EQT, a global private equity firm, to deploy up to 10,000 NEO robots across EQT's portfolio companies between 2026 and 2030. The deployment will focus on facility operations, logistics, warehousing, manufacturing, and healthcare — marking a significant pivot from home-focused marketing to industrial applications.

COMMERCIAL TRACTION

NEO Beta was officially unveiled in August 2024. In January 2026, 1X opened pre-orders for NEO in the U.S. at \$20,000 or \$499/month subscription, with deliveries planned for 2026 and expansion to Europe and Asia in 2027.

Confirmed traction includes:



CES 2026 VISIBILITY

NEO made its public debut at CES 2026 in January, with 1X announcing pricing, subscription model, and delivery timeline



COMMERCIAL AVAILABILITY

Active data collection from domestic environments.



FAMILY POSITIONING

Clear transition from concept to physical deployment.

NEO Beta is now available for pre-order. It is not yet a mass-market product, and its value lies in real-world learning alongside early commercialization.

3.2

AGIBOT (SHANGHAI) A2 HUMANOID ROBOT

Agibot is a Shanghai-based robotics company developing advanced humanoid robots. The A2 model represents the company's focus on real-world interaction and industrial usability.



WHAT'S COOL

AgiBot A2 is designed for **natural human-robot interaction**, grounded in ergonomic principles. It operates comfortably around people, tools, and structured environments. A variant, **A2-Max**, is tuned for light industrial tasks such as material handling and palletizing, with stronger arms and an expanded battery for longer duty.

Key features include:

- ✓ **Human-like proportions:** approximately 175cm tall and 85kg.
- ✓ **Ergonomic design:** humanoid skeletal structure optimized for human contexts.
- ✓ **Interactive screen and multimodal sensors:** supporting vision, voice, and touch.
- ✓ **Perception suite:** Lidar, RGBD cameras, microphones, and speakers for rich sensing.
- ✓ **Dexterous hand:** capable of engaging with objects in structured tasks.
- ✓ **Multi-modal interaction:** voiced conversation, facial recognition, and intent understanding.

- ✓ **Interactive AI:** conversational dialogue with natural speech and response flow.
- ✓ **Autonomous mobility:** designed to navigate complex spaces with reliable localization.
- ✓ **Safety and perception:** panoramic perception and obstacle avoidance systems.
- ✓ **Maintenance ease:** hot-swappable batteries and multi-platform control support.

A2's ergonomic proportions and multi-sensor integration enhance comfort in human-facing scenarios. Technically, AgiBot robots are noted for their stamina and robustness: in November 2025, an AgiBot A2 set a Guinness World Record for the longest journey walked by a humanoid robot, covering 106 km autonomously from Suzhou to Shanghai over 56 hours without any remote control

WHY IT MATTERS

AgiBot A2 moves humanoid robotics toward **everyday human environments**. Most advanced robots today still struggle outside controlled lab settings.

A2'S DESIGN ENABLES:

- Seamless entry into spaces built for humans
- Navigation of stairs, doorways, and tools without adaptation
- Rich interaction through voice, vision, and touch systems

The robot's interaction stack bridges physical presence with human-comfort capabilities. This allows it to serve users without extensive retraining or environment redesign. A2 is positioned as a bridge between industrial utility and **social functionality**, expanding potential use cases beyond manufacturing.

By combining perception, mobility, and human interaction, A2 expands the role of humanoids from static automation to **interactive embodiments of AI**.

TRACTION

AgiBot A2 is already visible beyond theoretical demonstrations.

Recent developments include:



PUBLIC SHOWCASES

A2 presented at high-profile industry events.



WORLD-RECORD PERFORMANCE

A2 completed a long-distance walk challenge exceeding 100 km from Suzhou to Shanghai, earning recognition for endurance.



MULTI-SCENARIO READINESS

ergonomic and interactive design aimed at customer-facing roles.



PRODUCT ECOSYSTEM

A2 variants include A2 (flagship interactive model), A2 Ultra, A2 Lite, A2-Max (heavy-load industrial variant), and A2-W (wheeled flexible manufacturing robot)



MULTI-MODAL INTERACTION USE CASES

marketed for exhibition guiding, reception work, and customer service in real settings.

A2's real-world deployment capabilities distinguish it from many lab-only humanoid projects.

3.3

AGILITY ROBOTICS (USA) DIGIT BIPEDAL ROBOT

Agility Robotics is a U.S. company founded in 2015 to commercialize bipedal locomotion research. Its work originated from Oregon State University's legged robotics program. Digit is Agility's second central platform, following the Cassie walking robot.

WHAT'S COOL

Digit is a **logistics-optimized biped**, not a human-mimicking humanoid. Its design prioritizes dynamic movement and stability over anthropomorphic appearance.

Key technical characteristics include:



✓ **Unique leg architecture:** derived from Cassie, enabling dynamic walking and recovery.

✓ **Backward-bending knees:** improve balance, step clearance, and energy efficiency.

✓ **Bipedal mobility:** navigates stairs, curbs, uneven ground, and outdoor terrain.

✓ **Arms for balance and manipulation:** assist locomotion and lift standardized objects.

✓ **Payload capacity:** carries up to **16 kg**.

✓ **Human-scale size:** approximately **175 cm tall** and **65 kg**.

✓ **Sensor-rich torso:** lidar, four depth cameras, IMU, and joint encoders.

✓ **Onboard compute:** dual Intel i7 CPUs with expansion for Jetson or similar modules.

✓ **Autonomous operation:** maps environments and navigates without fixed infrastructure.

✓ **Self-recovery:** capable of getting up after falling.

Digit is engineered to survive real environments, not controlled demos.

WHY IT MATTERS

Digit solves a specific problem: **human-scale logistics in complex spaces**. Most warehouses were built for people, not robots.

DIGIT FITS THESE SPACES BECAUSE:

- Legs handle vertical and uneven environments.
- Sensors support navigation around humans and obstacles.
- Arms enable basic material handling without the need for complex grippers.

Agility involves fine dexterity to reduce failure points. The robot focuses on repetitive, physically demanding tasks.

THIS APPROACH REDUCES:

- Integration complexity
- Maintenance risk
- Deployment friction

Digit represents a pragmatic interpretation of humanoid robotics.



COMMERCIAL TRACTION

Digit has progressed beyond research-only status.

Concrete traction includes:



AMAZON TESTING

Digit operates in Amazon’s robotic R&D warehouse environments.



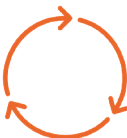
LOGISTICS PILOTS

deployed for tote movement and package handling.



MANUFACTURING SCALE

Agility’s Oregon factory targets **up to 10,000 units annually**.



PLATFORM MATURITY

continuous iteration since its 2019 unveiling.

Outside of Amazon, Agility has other pilot customers: Ford conducted an early trial with Digit to carry car parts (initially as a demo of last-mile delivery to a home), and more recently, Gap Inc. tested Digit in a distribution center to handle returned clothing parcels. Since then, Agility has expanded to commercial deployments with Toyota, Schaeffler, and GXO.

3.4

BOSTON DYNAMICS (USA) ELECTRIC ATLAS

Boston Dynamics is a robotics company focused on advanced mobility and embodied intelligence. It has spent decades researching dynamic movement and whole-body robotic control. Atlas is the company's flagship humanoid research platform.

WHAT'S COOL

Electric Atlas is a fully electric humanoid designed for real-world physical performance.

It represents the next generation of Boston Dynamics' humanoid research.

Key highlights include:



- ✓ **Fully electric design:** replaces hydraulic systems with electric power.
- ✓ **High-power architecture:** custom battery and advanced actuators deliver strong output.
- ✓ **Advanced control system:** plans complex whole-body movements in real time.
- ✓ **Exceptional agility:** capable of advanced athletics, balance, and rapid motion.
- ✓ **Whole-body coordination:** arms, legs, and torso work together during tasks.
- ✓ **Lightweight structure:** titanium and aluminum 3D-printed components improve the strength-to-weight ratio.



Precision engineering: every component is designed, manufactured, and calibrated in-house.

Atlas emphasizes physical intelligence over social interaction.

WHY IT MATTERS

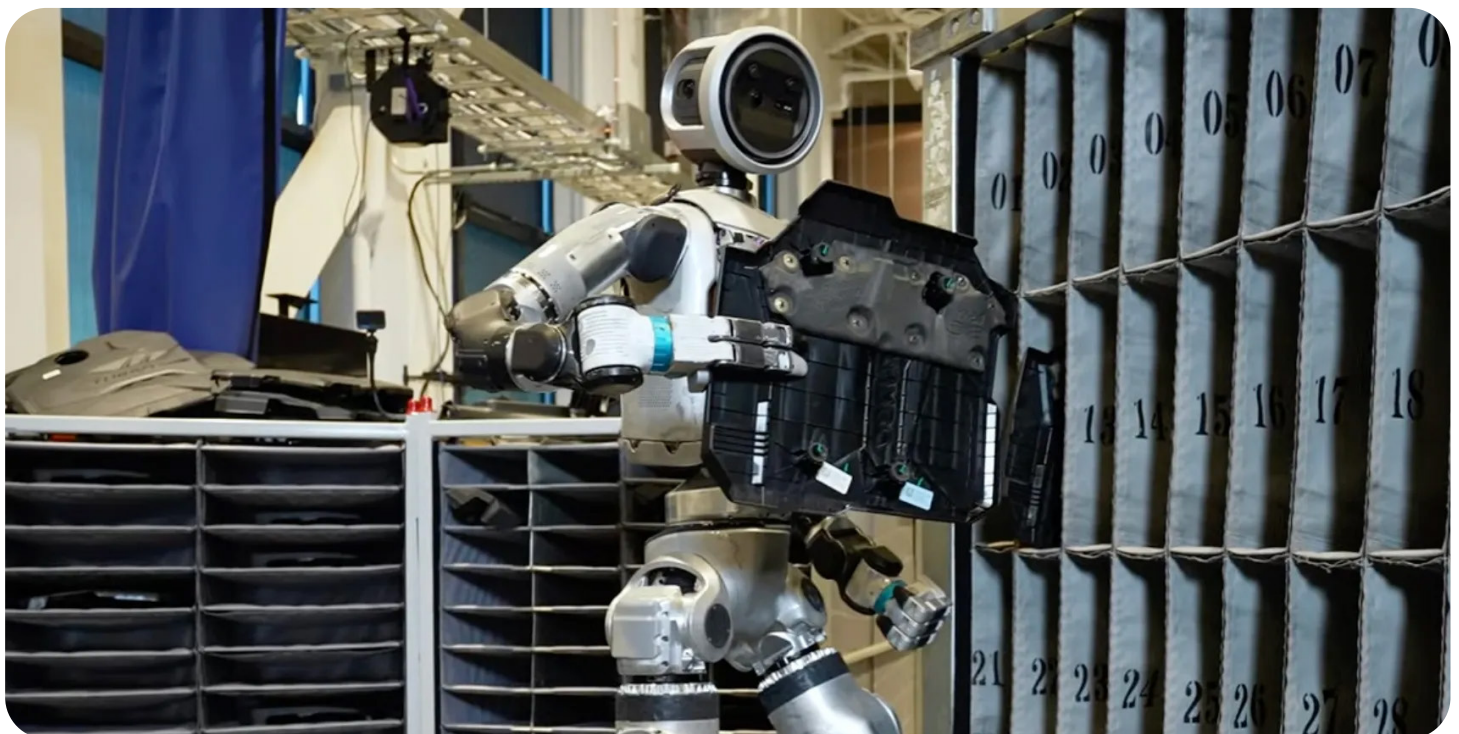
Atlas explores the full potential of the humanoid form factor. It demonstrates how robots can move quickly, balance, and dexterously.

BOSTON DYNAMICS USES ATLAS TO:

- Advance embodied AI research
- Improve perception and environmental awareness
- Develop reliable whole-body manipulation

Atlas shows what is physically possible with humanoid robots today. Many companies benchmark Atlas when designing locomotion systems.

Rather than rushing commercialization, Boston Dynamics prioritizes capability and reliability. Atlas shapes the future of mobile robots, even without direct sales.



COMMERCIAL TRACTION

Atlas transitioned from a research platform to a production-ready commercial robot in January 2026, with the all-electric version unveiled at CES 2026 . Boston Dynamics began commercial sales in early 2026, and the entire 2026 production run is already fully committed . Hyundai plans to build a factory capable of producing 30,000 Atlas units annually by 2028.

Current traction includes:



COMMERCIAL PRODUCTION

production-ready Atlas unveiled at CES 2026; commercial sales began early 2026; first units shipping to Hyundai and Google DeepMind.



INDUSTRY PILOTS

initial deployment at Hyundai Motor Group Metaplant America in Georgia for parts sequencing tasks (2028), expanding to component assembly by 2030.



AI INTEGRATION

partnership with Google DeepMind to integrate Gemini Robotics AI, enabling reasoning and adaptation in unstructured environments.



CONTINUOUS R&D

final research version showcased gymnastic capabilities (cartwheel to backflip) in February 2026; performance testing in final stages.



COMMERCIAL SALES

Atlas is now offered as a commercial product; 2026 production fully committed; long-term goal includes home use.

Atlas’s impact comes from influence, not deployment volume. It defines the industry’s ceiling for humanoid movement.



3.5

DEEP ROBOTICS (HANGZHOU) DR02 INDUSTRIAL HUMANOID

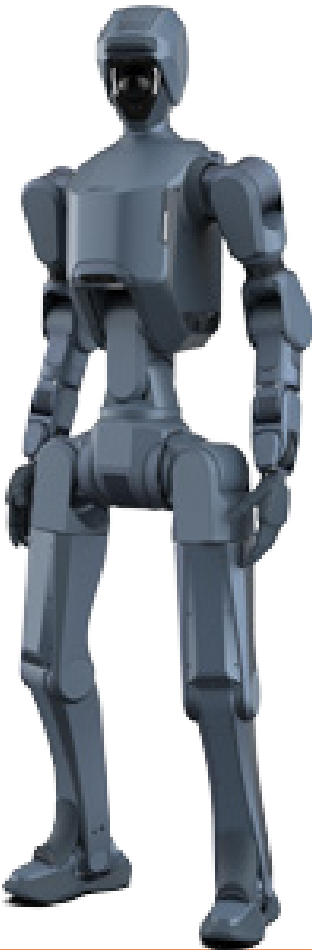
Deep Robotics is a Hangzhou-based robotics company specializing in industrial-grade legged robots. It is known for deploying robots in security, inspection, and harsh outdoor environments. DR02 is the company’s first full-size industrial humanoid robot.

WHAT’S COOL

DR02 is the world’s first humanoid robot with **IP66 full-body protection**. It is designed for continuous outdoor and industrial operation.

Key capabilities include:

- ✓ **IP66 waterproof and dustproof:** operates reliably in rain, humidity, and dust.
- ✓ **All-weather operation:** designed for environments where most humanoids fail.
- ✓ **Wide temperature range:** functions from **-20°C to 55°C** without performance loss.
- ✓ **Human-compatible design:** fits existing tools, stairs, corridors, and workspaces.
- ✓ **Stable locomotion:** traverses uneven terrain while maintaining balance.
- ✓ **Practical task handling:** supports cargo transport and emergency operations.
- ✓ **Modular quick-detach design:** arms and legs can be rapidly replaced.



✓ **Low-downtime maintenance:** modular components reduce operational interruptions.

✓ **High computing capacity:** supports perception, planning, and intelligent evolution.

DR02 is built for environments robots usually avoid.

WHY IT MATTERS

Most humanoid robots require clean, controlled indoor environments. DR02 breaks that limitation.

INDUSTRIAL SITES FACE CONDITIONS LIKE:

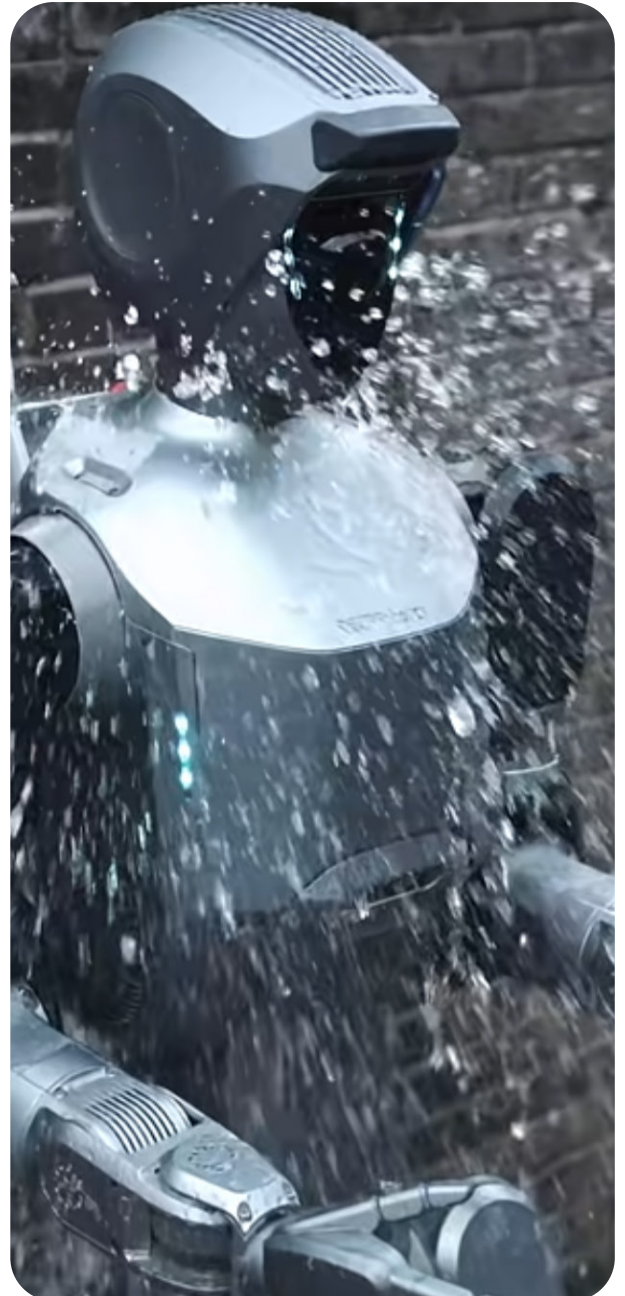
- Rain and humidity
- Dust and debris
- Temperature extremes
- Continuous operation demands

DR02 directly targets these constraints. It expands humanoid deployment beyond factories and showrooms. The modular quick-detach design is commercially important. It reduces maintenance costs and increases uptime.

THIS MAKES DR02 VIABLE FOR:

- Outdoor industrial inspection
- Logistics yards
- Emergency response scenarios
- Mixed indoor–outdoor operations

DR02 reframes humanoids as field machines rather than lab experiments.



COMMERCIAL TRACTION

Deep Robotics has established long-term partnerships with State Grid and China Southern Power Grid for substation inspection applications using its quadruped robots . In October 2025, the company launched DR02, the world's first all-weather industrial humanoid robot with IP66 full-body protection.

On public demonstrations: Deep Robotics took DR02 to the WAIC 2025 expo in Shanghai and let it walk through an “urban obstacle course” booth, impressing attendees that it didn’t slip on wet surfaces or uneven paths while carrying a load.

Current traction indicators include:

- 

OFFICIAL UNVEILING
introduced as an industrial-level humanoid robot.
- 

CLEAR DIFFERENTIATION
positioned around all-weather deployment capability.
- 

INDUSTRY FOCUS
marketed for industrial, logistics, and emergency scenarios.
- 

OPERATIONAL DESIGN
optimized for long-duration, real-world use.

Mass deployment timelines are not publicly disclosed. The product focus is capability validation, not marketing scale. Deep Robotics enters the humanoid market with a clear industrial niche.

3.6

ENGINEAI (SHENZHEN) PM01 & SE01 HUMANOID PLATFORMS

EngineAI Robotics is a Shenzhen-based humanoid robotics company focused on **embodied intelligence at scale**. Unlike peers optimizing a single flagship, EngineAI operates a **multi-platform strategy**, spanning lightweight open humanoids (SE01, PM01) and a full-size, high-performance humanoid (T800). Together, these platforms target research accessibility, rapid motion learning, and real-world deployment readiness.

SE01 & PM01: OPEN, LIGHTWEIGHT PLATFORMS FOR EMBODIED INTELLIGENCE

EngineAI’s **SE01** established its early commercial presence as an open humanoid platform for education and research. Building on this foundation, **PM01** is positioned as the company’s latest lightweight flagship, emphasizing **motion learning, openness, and affordability** rather than payload capacity.

PM01 – Key Technical Characteristics

- ✓ **Height/weight:** 1.38 m, ~40 kg
- ✓ **Degrees of freedom:** 24 DoF
- ✓ **Speed:** up to 2 m/s
- ✓ **Waist rotation:** up to 320° for dynamic motion sequences
- ✓ **Dual gait modes:** mechanical walking and natural humanoid gait
- ✓ **Motion learning:** optical motion capture with end-to-end neural networks



✓ **Compute stack:** x86 architecture with NVIDIA Jetson Orin

✓ **Open development:** supports cross-platform algorithms and application deployment

✓ **Interface:** Iron-Man-inspired control and monitoring screen

PM01 is designed for **adaptability and experimentation**, enabling universities, developers, and early service pilots to train full-body intelligence without the need for industrial-scale investment. In 2026, EngineAI announced a partnership to develop PM01 for space applications, targeting the world's first bionic robot astronaut.

WHY PM01 AND SE01 MATTER

EngineAI directly addresses a persistent bottleneck in humanoid accessibility. Most humanoids remain expensive, closed, and slow to iterate.

BY PRIORITIZING OPEN ARCHITECTURE AND LOWER ENTRY COST, ENGINEAI ENABLES:

- Faster iteration of locomotion and embodied AI models
- Higher deployment volume for real-world learning
- Earlier feasibility for service, hospitality, and public-facing trials
- Shorter feedback loops across China’s humanoid research ecosystem

This “volume learning” approach favors **many robots learning quickly**, rather than a few headline demonstrations.



T800: FULL-SIZE FLAGSHIP FOR HIGH-STRESS PHYSICAL INTELLIGENCE

In contrast to PM01’s lightweight philosophy, **T800** represents EngineAI’s **full-scale flagship humanoid**, unveiled publicly at the **World Robot Conference 2025**. The T800 is engineered for **heavy-duty tasks and high-dynamic stress testing**, using physical combat scenarios as an R&D accelerator rather than a military application.

T800 – Reported Specifications

- ✓ **Height:** 173cm
- ✓ **Weight:** 75kg-85kg
- ✓ **Degrees of freedom:** 43 high-DoF joints
- ✓ **Power:** solid-state battery
- ✓ **Structure:** aluminum alloy body covers for resilience

T800 serves as the core platform in EngineAI's Ultimate Robot Knockout Legend (URKL) —the world's first commercial humanoid robot free-combat league—which launched in February 2026 and runs through December. These events function as stress tests for balance recovery, impact tolerance, and real-time control, extracting training data that feeds back into industrial, service, and retail humanoid use cases.



COMMERCIAL TRACTION

As of 2026, EngineAI has moved beyond the prototype stage into commercial production and deployment. The company displayed PM01 and T800 at CES 2026, drawing international attention with dynamic demonstrations including PM01's front flip capability.

There are rumors that EngineAI is partnering with a Chinese tech park to use robots as attractions.

Confirmed traction includes:



MULTIPLE HUMANOID LAUNCHES

six humanoid models released since company founding in 2023, spanning bipedal platforms (SA01, PM01), full-size humanoids (SE01, T800), and a quadruped (JS01).



SE01 AVAILABILITY

commercial and educational versions sold globally.



PRICING STRATEGY

PM01 priced at 188,000 yuan (approximately \$27,000); T800 base model starts at 180,000 yuan (\$25,000).



EARLY DELIVERIES

nearly 100 units delivered within five months. production capacity scaling to thousands in 2026.



FUNDING PROGRESS

completed A1+ and A2 financing rounds in December 2025, backed by Huangpu River Capital, Henan Investment Group, CCTV Fund, and others; cumulative Pre-A++ and Series A1 funding reached 1 billion yuan prior to current round.

PM01 is positioned for global sales, not just internal pilots. EngineAI focuses on volume learning, not headline deployments.



3.7

FOURIER INTELLIGENCE (SHANGHAI) GR-3 CARE-BOT

Fourier Intelligence is a Shanghai-based robotics company focused on healthcare and rehabilitation robotics. It expanded into humanoids to address aging populations and human-centered care scenarios. GR-3 represents Fourier’s shift from industrial assistance toward social and assistive companionship.

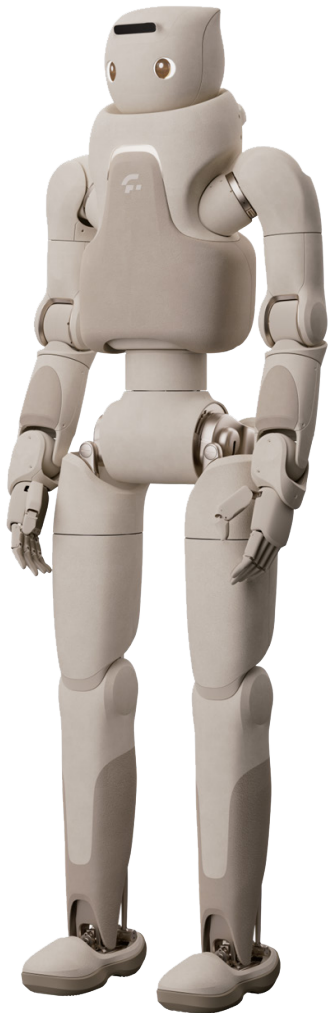
WHAT’S COOL

GR-3 is Fourier’s first full-size “care-bot” designed for emotional and social interaction.

It emphasizes warmth, safety, and trust rather than industrial strength.

Key highlights include:

- ✓ **Human-scale design:** approximately 165 cm tall and 71 kg.
- ✓ **Soft exterior:** cushioned surfaces with premium automotive-style upholstery.
- ✓ **Friendly aesthetics:** warm colors, smooth contours, and approachable proportions.
- ✓ **Articulated body:** 55 joints supporting bending, squatting, and natural posture changes.
- ✓ **Multimodal interaction:** integrated vision, audio, and tactile perception.
- ✓ **Tactile sensing:** 31 distributed pressure sensors enable real-time touch feedback.



- ✓ **Visual recognition:** RGB and structured-light cameras support face recognition and tracking.
- ✓ **Audio perception:** a four-microphone array enables voice activation and sound localization.
- ✓ **Expressive interface:** animated facial display with eye tracking and micro-expressions.
- ✓ **Motion versatility:** standard walking, bouncy walk, running, and energy-saving fatigue mode.
- ✓ **Battery life:** approximately three hours of operation.

GR-3 is designed to feel emotionally responsive rather than mechanically impressive.

WHY IT MATTERS

GR-3 targets a different humanoid category: social and assistive robotics. Most humanoids focus on factories, logistics, or heavy manipulation.

FOURIER PRIORITIZES HUMAN COMFORT AND EMOTIONAL ENGAGEMENT:

- Soft surfaces reduce perceived risk during close interaction.
- Emotional feedback builds trust in public and care environments.
- Multimodal sensing supports natural, intuitive communication.

THIS POSITIONING ALIGNS WITH DEMOGRAPHIC REALITIES:

- Aging populations require scalable care support.
- Healthcare systems face staff shortages and rising costs.
- Social isolation increases demand for companion technologies.

GR-3 bridges robotics and care without medicalizing the interaction. It functions as a service assistant, companion, and future care aide. This expands the relevance of humanoids beyond factories and warehouses.

Fourier’s background in rehabilitation robotics strengthens credibility. Care, safety, and human interaction are already core competencies.

COMMERCIAL TRACTION

GR-3 is positioned for **public, service, and care environments**, not heavy industry. Current traction includes:



PUBLIC INTERACTION READINESS

designed for malls, exhibitions, and service spaces.



CARE-FOCUSED ROADMAP

future expansion into mobility assistance and health monitoring.



HEALTHCARE ALIGNMENT

intended use in rehabilitation and clinical support scenarios.



PLATFORM MATURITY

integrated sensing, motion, and interaction systems already demonstrated.

GR-3 remains early-stage in commercial rollout. Fourier positions it as a long-term care and companionship platform. Deployment will likely scale through pilots in public and healthcare settings.

3.8

GALBOT (BEIJING)

GALBOT G1 HUMANOID ROBOT

Galbot (Beijing Galbot Co., Ltd.) is a Beijing-based robotics company founded in May 2023, focused on embodied intelligence and general-purpose humanoid robots for commercial and industrial applications. The company emphasizes practical deployment and scalable commercialization over laboratory demonstrations.

WHAT'S COOL

Galbot G1 is designed as a versatile general-purpose robot for retail, logistics, manufacturing, and healthcare. Its core differentiator is AstraBrain, the world's first integrated end-to-end embodied large model unifying "brain-cerebellum-neural control" into a single architecture.

Key characteristics include:



Wheeled bipedal design: hybrid configuration with 360° omni-directional base and folding leg, enabling seamless switching between wheeled mobility and bipedal stability.



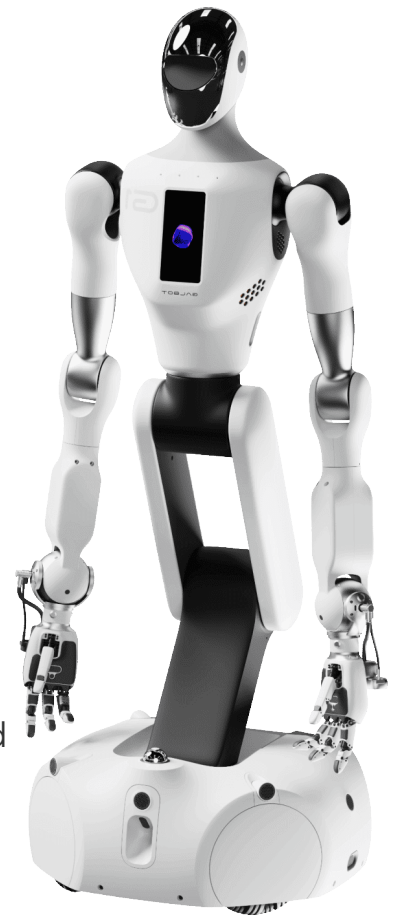
Human-scale form: approximately 173 cm tall and 85 kg, with a reach of up to 2.4 meters.



Practical payload: arms support loads up to 5 kg per arm for general manipulation tasks.



Industry-leading grasping: powered by GraspVLA, the world's first end-to-end grasping foundation model, achieving over 95% grasp success rate on complex objects, including fragile and irregularly shaped items.



✓ **Sensor-rich perception:** multi-modal sensor suite with 3D vision for precise manipulation and safe collaboration.

✓ **AstraBrain AI system:** translates natural language into physical actions in real time, enabling autonomous task execution without pre-programmed scripts.

✓ **End-to-end learning:** trained on a self-constructed tens-of-billions-scale embodied intelligence dataset through massive simulation and reinforcement learning.

✓ **Human-in-the-loop learning:** teleoperation and data collection accelerate skill acquisition across diverse scenarios.

Galbot G1 is a wheeled-bipedal humanoid designed for real-world commercial deployment, powered by end-to-end AI and industry-leading grasping.

WHY IT MATTERS

Galbot G1 addresses a fundamental bottleneck in humanoid robotics: moving from controlled demonstrations to real-world, sustained commercial operation.

Galbot's approach prioritizes practical deployment over technical spectacle. Its robots have achieved over one year of continuous 24/7 operation in real commercial environments—a first in the embodied AI industry.

GALBOT'S APPROACH PRIORITIZES

Real-world deployment across retail, logistics, manufacturing, and healthcare
 Scalable commercialization with verified ROI (reduces labor needs by over 50%)
 End-to-end AI that generalizes across tasks without task-specific programming
 High reliability with proven uptime and accuracy (99.95% order success rate).

COMMERCIAL TRACTION

Galbot G1 has achieved significant commercial scale beyond laboratory demonstrations.

Verified traction includes:

MASSIVE ORDER VOLUME



Following the 2026 Spring Festival Gala appearance, Galbot G1 received hundreds of orders within 24 hours, including nearly 300 units purchased overnight; a 630,000 yuan model sold out within 12 minutes on JD.com.

PHARMACY DEPLOYMENT



First pharmaceutical robot in China with official Drug Distribution License. Deployed in Beijing’s Haidian District, operating 24/7 in a 70-square-meter pharmacy, handling over 5,000 SKUs with 99.95% order accuracy and reducing labor costs by over 50%. Completed over 300,000 orders and sold approximately 1 million items across nearly 100 smart pharmacy locations nationwide.

MANUFACTURING PARTNERSHIPS



Strategic deployment agreements with CATL (200 units for battery handling, 99.8% inspection accuracy), Baida Precision Machinery (1,000+ units), Bosch, Toyota, Hyundai, BAIC, and others for material handling, inspection, and assembly tasks.

Galbot G1 is currently in active commercial rollout across multiple industries. While scaling continues, the company has demonstrated that general-purpose humanoid robots can achieve sustained, reliable operation in real-world environments at commercial scale.

RESEARCH

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3.9

KEYI ROBOTICS (BEIJING) LOONA AI COMPANION ROBOT

KEYi Robotics, also known as KEYi Tech, is a Beijing-based consumer robotics company. It focuses on AI companion robots designed for homes and families. KEYi's flagship products prioritize emotional interaction over physical labor.

WHAT'S COOL

KEYi's flagship robot, Loona, is an AI-powered companion petbot. It was one of the most engaging consumer robots showcased at CES 2025 and returned with a new product at CES 2026.

Key characteristics include:



- ✓ **Compact design:** about one foot tall with a wheeled, dog-like form.
- ✓ **Expressive interface:** animated face, ears, and body language.
- ✓ **Conversational AI:** powered by ChatGPT for natural dialogue.
- ✓ **Gesture and voice response:** reacts to movement, tone, and commands.
- ✓ **Face recognition:** distinguishes between different household members.
- ✓ **Behavior learning:** adapts to user habits over time.
- ✓ **Home monitoring:** supports remote observation through a mobile app.

✓ **Autonomous charging:** docks itself when the battery runs low.

✓ **Two-hour battery life:** designed for short, frequent interactions.

Loona behaves less like a gadget and more like a responsive pet.

WHY IT MATTERS

KEYi proves that **embodied AI already works at consumer scale**. Loona succeeds without a humanoid form or physical labor tasks.

THIS MATTERS BECAUSE:

- Emotional engagement drives daily usage.
- Companion robots face fewer safety and regulatory barriers.
- Homes provide constant real-world interaction data.

Loona generates continuous behavioral feedback. This data is difficult for industrial humanoid robots to obtain.

KEYI FOCUSES ON:

- Emotional intelligence
- Human-AI bonding
- Trust and familiarity in domestic spaces

These capabilities are foundational for future humanoid interaction design.



COMMERCIAL TRACTION

KEYi Robotics shows real consumer traction.

Current indicators include:



CES 2026 VISIBILITY

Loona DeskMate, a new desktop AI companion powered by iPhone, drew strong media and audience attention at CES 2026.



COMMERCIAL AVAILABILITY

Loona retails at approximately \$449, with the new DeskMate product planned for a Kickstarter launch in March 2026 at a target price below \$300.



FAMILY POSITIONING

marketed as a companion for households with children.



PRODUCT ECOSYSTEM

accessories, charging docks, and modular upgrades available. new Loona DeskMate adds a desktop AI companion for office use.



SECOND FLAGSHIP

Clicbot offers a programmable, modular robotics platform.

KEYi robots are already deployed in homes. They are not pilots or concept demos.

3.10

NEURA ROBOTICS (GERMANY) 4NE-1 COGNITIVE HUMANOID

NEURA Robotics is a Germany-based robotics company focused on cognitive and collaborative robots. The company positions humanoids as intelligent teammates rather than isolated automation systems. 4NE-1 is NEURA's flagship next-generation humanoid platform.



WHAT'S COOL

4NE-1 is designed to move like humans and work safely alongside them. It combines human-like motion, full-body sensing, and multimodal intelligence.

Key capabilities include:

- ✓ **Human-scale design:** approximately 180 cm tall and 80 kg.
- ✓ **Wide payload range:** supports loads from 10 to 100 kilograms.
- ✓ **Full-body perception:** 360° awareness using multimodal sensor systems.
- ✓ **Sensor skin:** enables safe physical interaction and contact awareness.
- ✓ **Multimodal AI:** integrates vision, language models, and reinforcement learning.
- ✓ **Adaptive control:** responds to changing environments in real time.

✓ **Mobility performance:** reaches speeds up to 5 km/h.

✓ **Exchangeable forearms:** support task-specific tools and maintenance.

✓ **Multiple configurations:** wheeled versions and extended-axis models available.

4NE-1 is built for unstructured, human-centric environments.

WHY IT MATTERS

SAFE AND FLEXIBLE HUMAN-ROBOT TEAMS

- Cognitive humanoids enable collaboration without fenced automation zones.
- Full-body sensing improves safety in shared human-robot workspaces.
- Modular configurations reduce customization costs across industries.
- Real-time task understanding supports flexible industrial workflows.
- European manufacturing values compliance, safety, and trust-driven automation.

4NE-1 aligns humanoid robotics with real industrial and domestic expectations.



COMMERCIAL TRACTION

As of 2026, NEURA has moved beyond prototypes and rumors to confirmed commercial partnerships and open reservations. The 4NE1 Gen 3.5 is now available for reservation with expected delivery in late 2026, priced at 98,000 per unit (1-19 units) or 60,000 (20+ units). The robot received a new design collaboration with Studio F.A. Porsche—designers of the Porsche 911—unveiled at CES 2026.

Confirmed industrial partnerships include HD Hyundai for shipbuilding applications, Bosch for sensor and "Physical AI" integration, and Schaeffler for robot joint development. NEURA also established its China headquarters in Hangzhou in October 2025. The company is reportedly in negotiations for a 1 billion funding round led by Tether. The robot is now production-ready, with a new 4NE1 Mini version (132 cm) launched for research and education. Potential early users include tech-forward manufacturers for logistics tasks.

Current traction indicators include:



VERSATILE CONFIGURATION OPTIONS

Multiple announced configurations for different environments.



KEY INDUSTRY & HOME USE

Positioning for logistics, manufacturing, and domestic assistance.



EARLY PILOT ACCESS INITIATIVES

Early-access programs targeting pilot deployments.

No mass-scale deployments are confirmed yet. Validation remains at the pilot and partner-engagement stage. 4NE-1 is positioned for real-world trials rather than immediate volume rollout.

3.11

SANCTUARY AI (CANADA) PHOENIX GENERAL-PURPOSE HUMANOID ROBOT

Sanctuary AI is a Vancouver-based robotics company focused on general-purpose humanoid intelligence. The company aims to replicate human-like cognition for physical work. Phoenix is Sanctuary AI's eighth-generation humanoid robot.



WHAT'S COOL

Phoenix is designed as a true general-purpose worker, not a task-specific robot. Its core differentiator is Carbon™, Sanctuary AI's proprietary cognitive control system.

Key characteristics include:

- ✓ **Human-scale form:** approximately 170 cm tall and 70 kg.
- ✓ **Meaningful payload:** supports loads up to 25 kg.
- ✓ **Industry-leading hands:** 21 degrees of freedom with proprietary haptic feedback.
- ✓ **Sensor-rich design:** enables precise manipulation and safe collaboration.
- ✓ **Carbon™ AI system:** translates natural language into physical action.
- ✓ **Explainable cognition:** task planning and reasoning are auditable.
- ✓ **Human-in-the-loop learning:** teleoperation accelerates skill acquisition.

Phoenix emphasizes intelligence and dexterity over athletic motion or visual realism.

WHY IT MATTERS

Most humanoids fail to generalize across tasks. Phoenix directly targets this limitation.

SANCTUARY’S APPROACH PRIORITIZES:

- Broad task coverage across industries.
- Rapid onboarding of new skills.
- Reduced dependence on task-specific programming.

General-purpose robots improve deployment economics. One adaptable humanoid replaces multiple specialized systems. Carbon™ positions intelligence as the primary value driver. This reframes humanoids as labor platforms rather than machines.

COMMERCIAL TRACTION

Phoenix has completed supervised commercial deployments. The robot has demonstrated hundreds of customer-identified tasks.

Confirmed traction includes:



BROAD INDUSTRY EXPANSION

Deployment across more than a dozen industries.



2025 STRATEGIC PARTNERSHIP

Strategic partnership with Magna International for manufacturing and in-factory deployment.



2024 COMMERCIAL MILESTONE

Completion of the first commercial installation in 2024.



STRONG BACKING INVESTMENTS

Strong institutional and government funding support.

Phoenix remains in controlled rollout. Scaling depends on continued intelligence reliability. However, Sanctuary AI has moved beyond pure demonstration.

3.12

TESLA (USA) OPTIMUS HUMANOID ROBOT

Tesla is a global electric vehicle and AI company expanding into humanoid robotics. Optimus is Tesla's general-purpose humanoid robot program announced in 2021. The project leverages Tesla's autonomous driving stack. In January 2026, Tesla began mass production of Optimus Gen 3 at its Fremont factory, targeting an annual capacity of 1 million units.



WHAT'S COOL

Optimus is designed as a general-purpose humanoid for repetitive and undesirable tasks.

The robot uses Tesla's vision-first, neural-network-driven AI approach.

Key characteristics include:

- ✓ **Human-scale form:** approximately 173 cm tall and 57 kg.
- ✓ **Vision-based perception:** relies primarily on cameras rather than lidar.
- ✓ **Neural control:** movement and tasks learned through end-to-end neural networks.
- ✓ **Improved dexterity:** hands evolved from 11 to 22 degrees of freedom.
- ✓ **Battery integration:** powered by Tesla's in-house battery technology.
- ✓ **Rapid iteration:** visible improvements between Generations 2 and 3.

Recent demos showed walking, object sorting, yoga poses, and delicate object handling. Some tasks in demonstrations relied on teleoperation rather than full autonomy. Optimus emphasizes functional execution over social expression or facial realism.

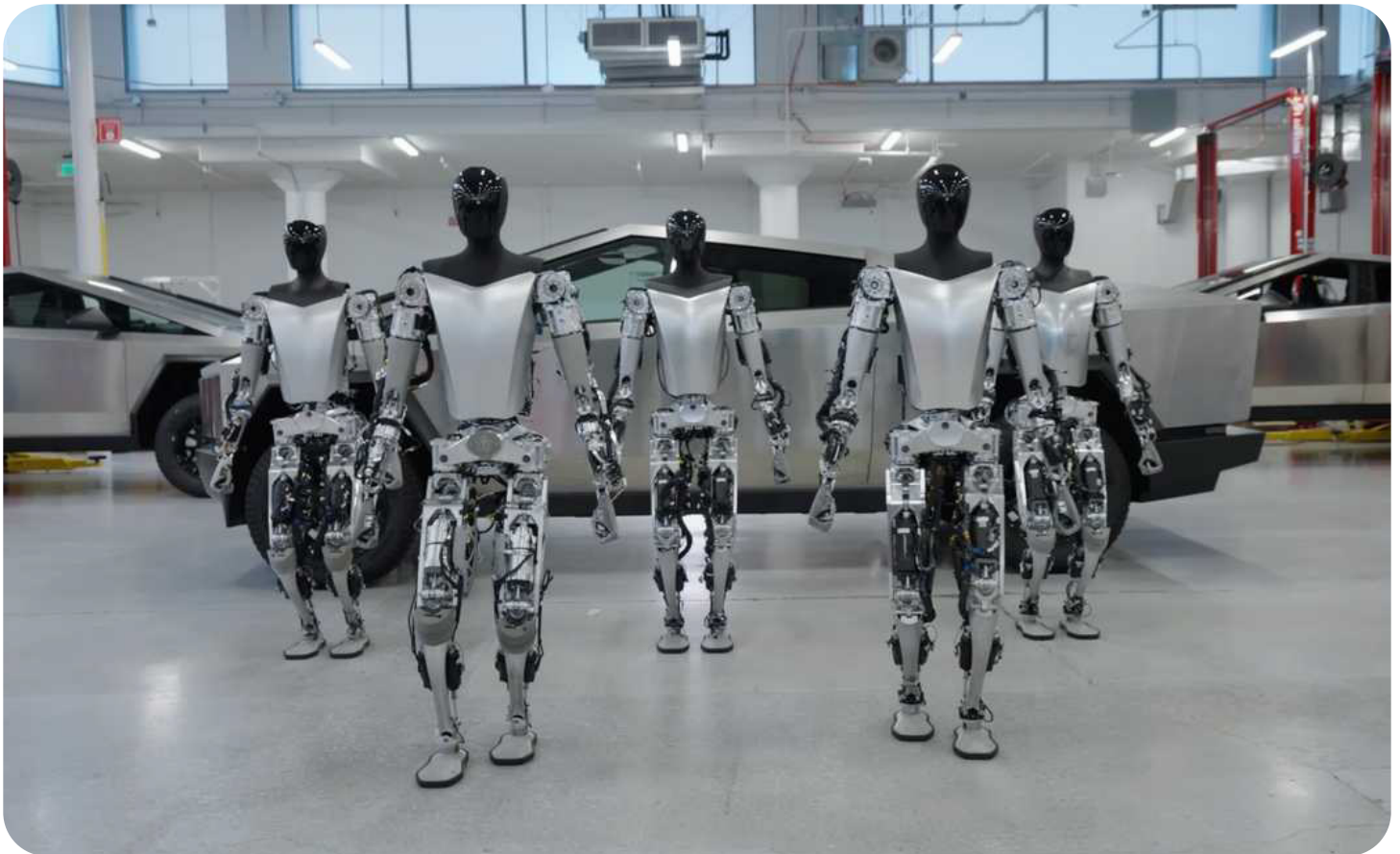
WHY IT MATTERS

Tesla frames humanoids as a **scalable labor platform**, not a niche robotics product. The company's core advantage is manufacturing scale and cost discipline.

TESLA ALREADY OPERATES:

- Large-scale factories
- Mature supply chains
- Continuous AI training pipelines

Optimus is intended to replace dangerous, repetitive, or boring human labor. Manufacturing and logistics are the primary target environments. Tesla also sets aggressive cost expectations. Leadership has suggested consumer-vehicle-level pricing over time.



This narrative pressures the entire humanoid robotics market. Competitors must justify higher prices or deliver faster deployment. However, expert reception remains mixed. Many observers note overpromising timelines and limited transparency about autonomy. Optimus represents ambition more than proven leadership today.

COMMERCIAL TRACTION

Optimus has progressed through multiple public development stages. Confirmed milestones include:



2022–2023

early prototypes demonstrating basic walking and manipulation.



2023–2024

Generation 2 showed improved balance, hands, and flexibility.



2025

Generation 3 introduced higher hand dexterity and public interaction demos.



INTERNAL TESTING

As of January 2026, Tesla has deployed over 1,000 Optimus robots across its Fremont and Gigafactory Texas facilities for tasks including battery cell sorting and parts handling.

Tesla plans limited production in 2026, with external sales targeted for the end of 2027.No large-scale commercial deployments exist yet, and current robots in Tesla factories are primarily for learning and validation rather than productive work. Most validation remains internal or demonstration-based, and Optimus is still a work in progress toward a market-ready platform.

3.13

UBTECH ROBOTICS (SHENZHEN) WALKER S2

UBTECH Robotics is a Shenzhen-based robotics maker founded in 2012. It specializes in humanoid and service robots used globally.

WHAT'S COOL

Walker S2 is a full-size industrial humanoid robot that entered mass production in November 2025, with over 1,000 units produced and production capacity expected to exceed 10,000 units in 2026. It has secured over 1.4 billion yuan (~\$200 million) in orders and is now deployed across five major industrial sectors, with key clients including Airbus and Texas Instruments. The robot features an autonomous battery-swapping system for 7×24 operation, a fourth-generation dexterous hand with sub-millimeter precision, and a pure RGB binocular vision system for spatial awareness in complex environments.



Key highlights include:

- ✓ **Human-size form:** about 1.76 m tall, designed for human workspaces.
- ✓ **52 degrees of freedom:** advanced motion across limbs and torso.
- ✓ **Payload handling:** can lift and manipulate up to 15 kg within a 0–1.8 m workspace.
- ✓ **Autonomous battery swap:** the robot can replace its own batteries in minutes to maintain continuous operation.
- ✓ **Binocular stereo vision:** dual RGB cameras provide “human-eye” depth perception.

✓ **AI autonomy:** proprietary Co-Agent agent system supports planning and anomaly handling.

✓ **Dynamic balancing:** algorithms support flexible, human-like motion.

Walker S2 combines mobility, perception, and intelligent autonomy on a single platform.

WHY IT MATTERS

Walker S2 represents a shift from prototypes to **industrial-scale humanoid deployment**.

IT TACKLES THREE CORE BARRIERS THAT HAVE SLOWED HUMANOID ADOPTION:

- **Continuous operation:** Autonomous battery swapping enables near 24/7 uptime.
- **Real-world readiness:** Designed for manufacturing, logistics, and data operations.
- **Scenario delivery:** UBTECH provides turnkey solutions, not just hardware.

The integration of **BrainNet+ Co-Agent** creates a unified AI platform for mission execution. Co-Agent handles intention understanding, task planning, tool use, and anomaly detection.

Stereo vision and deep-learning perception help Walker S2 navigate structured factory spaces. This reduces reliance on pre-configured fixtures or human supervision. UBTECH's model blends hardware, software, and deployment practices into a replicable industrial solution.

COMMERCIAL TRACTION

Walker S2 began mass production and delivery in November 2025, with over 1,000 units produced and more than 500 delivered by year-end, surpassing the initial 500-unit target. UBTECH achieved the world's first mass delivery of industrial humanoid robots for real-world factory deployment, with orders exceeding 1.4 billion yuan (~\$200 million) . The company plans to scale production to 10,000 units annually by 2026.

Confirmed traction includes:



ORDERS > 1.4 BILLION YUAN
(US\$200 M) IN 2025.



LARGE CONTRACTS:
multi-hundred-million-yuan deployments in data centers.



INDUSTRIAL PARTNERS
BYD, Geely, FAW-Volkswagen, Audi FAW, Foxconn, SF Express.



PRODUCTION ROADMAP
capacity targets of 5,000 units by 2026 and 10,000 units by 2027.

Walker S2 is now deployed on **automotive floors, in smart factories, at logistics hubs**, and in data facilities. UBTECH’s shift from product sales to **operational deployments** signals that industrial humanoids are moving from pilots to real use cases.



3.14

UNITREE ROBOTICS (HANGZHOU) G1 HUMANOIDS

Unitree Robotics was founded in 2016 by **Wang Xingxing** in Hangzhou. The company emerged from academic research into **low-cost, high-performance legged locomotion** and became globally recognized for its affordable quadruped robots used in research, inspection, and education. Unitree's humanoid efforts extend the same philosophy to bipedal platforms, prioritizing **cost efficiency, agility, and developer access** over human realism.



WHAT'S COOL

Unitree's humanoid strategy deliberately avoids social or anthropomorphic positioning. Instead, the company treats humanoids as programmable dynamic machines, optimized for motion control, balance, and experimentation. In 2026, this approach has yielded unprecedented breakthroughs in athletic capability, environmental resilience, and real-world deployment.

Key characteristics across the **G1 and H-series platforms** include:

- ✓ **Compact and Foldable Design:** G1 features a compact form factor at 132 cm tall and 35 kg, with a unique folding capability that reduces height to just 69 cm—enabling easy transport, storage, and deployment in space-constrained environments.
- ✓ **Optimized Degrees of Freedom for Dynamic Motion:** G1 delivers 23 total degrees of freedom—6 per leg, 5 per arm, and 1 waist—prioritizing agile locomotion and dynamic movement over fine manipulation, striking an optimal balance between capability and cost.
- ✓ **High-Power Joint Output:** G1 achieves knee joint torque of 90 N·m and arm payload capacity of approximately 2 kg, providing sufficient power for running, jumping, and light manipulation tasks while maintaining energy efficiency.
- ✓ **Comprehensive Environmental Perception:** G1 integrates a depth camera and 3D LiDAR for precise environmental mapping and obstacle avoidance, complemented by a 4-microphone array for voice localization and audio interaction in noisy environments.

✓ **Quick-Swap Power System with Continuous Runtime:** G1 is equipped with a 9,000 mAh quick-release battery delivering approximately two hours of operation; a hot-swappable design enables continuous deployment without downtime.

✓ **Scalable Compute Architecture:** G1 features an 8-core high-performance CPU as standard, with optional high-performance compute modules (such as NVIDIA Jetson Orin) supporting advanced AI workloads including Vision-Language-Action models.

✓ **Low-Latency Wireless Connectivity:** G1 supports WiFi 6 and Bluetooth 5.2 for high-speed data transmission and low-latency remote control, with a manual controller included for out-of-the-box operation.

✓ **Unmatched Price-to-Performance Ratio:** G1 is priced at \$13,500—radically undercutting competing humanoid platforms and maintaining Unitree's accessibility-first positioning, making humanoid experimentation accessible to universities, startups, and industrial teams.

Unitree explicitly optimizes for **accessibility and performance**, not polish or realism.

WHY IT MATTERS

Unitree is reshaping humanoid robotics economics. Its pricing radically lowers the barrier to humanoid experimentation.

THIS APPROACH ENABLES:

- Universities to run embodied AI research at scale.
- Startups to prototype humanoid applications without massive capital.
- Industrial teams to test feasibility before significant automation investments.
- Open-source communities to develop foundation models and applications on accessible hardware

Unitree’s strategy mirrors its quadrupled success. Affordable hardware accelerated global adoption and software innovation. The same pattern is emerging in humanoids. Unlike premium humanoid platforms, Unitree accepts trade-offs. It sacrifices realism and polish for speed, agility, and access. This accelerates learning cycles across the ecosystem.

In China, this continues to align with a culture of rapid iteration. More robots in more environments generate faster feedback loops. Unitree continues to pressure competitors on pricing, forcing justification for six-figure humanoid platforms.

COMMERCIAL TRACTION

Unitree has achieved some of the highest visibility and experimentation density in humanoid robotics. Rather than pursuing early industrial rollouts, the company has focused on seeding humanoids into research, development, and public testing environments.

Following early deliveries to ETH Zurich and Carnegie Mellon University in 2024, Unitree deepened its research partnerships in 2026. On February 28, the University of Hong Kong and Unitree established a Joint Laboratory for Embodied Intelligence in Shanghai, focusing on whole-body motion control, dexterous manipulation, and VLM-based autonomous decision-making

Current traction includes:



PUBLIC DEMONSTRATIONS
frequent videos showing agility, balance, and manipulation.



RESEARCH ADOPTION
deployed across universities and AI labs worldwide.



DEVELOPER INTEREST
strong uptake for reinforcement learning and teleoperation research.



GLOBAL EXPOSURE
covered extensively by IEEE Spectrum and robotics media.



ONGOING DEVELOPMENT
H1 and G1 remain active platforms with expanding configurations.

Unitree has not announced large-scale industrial deployment. Its current strength lies in the scale of experimentation, not factory rollout. Beyond controlled environments, Unitree has begun testing humanoids in complex public settings.

On February 16, 2026, Unitree's G1 humanoid robots delivered the world's first fully autonomous humanoid robot cluster martial arts performance at the CMG Spring Festival Gala, achieving multiple world-first breakthroughs: a launched aerial flip exceeding 3 meters in height, continuous single-leg flips, a two-step wall-assisted backflip, an Airflare spin of 7.5 rotations, and high-speed coordinated movement reaching 4 m/s . The spectacle quickly went viral, drawing widespread acclaim.



3.15

XPENG ROBOTICS (Guangzhou CHINA) IRON & NEXT-GEN IRON

XPENG Robotics is the humanoid robotics division of XPENG Motors, a leading Chinese electric-vehicle company. It extends XPENG's autonomous driving, AI chip, and manufacturing capabilities into embodied intelligence. Humanoid robots are positioned as a long-term pillar of XPENG's broader AI Tech Tree strategy.

WHAT'S COOL

XPENG's humanoid robot IRON is built around a philosophy of **extreme anthropomorphism**. The company believes a human-like structure accelerates deployment, learning, and real-world usability. A viral demo in late 2025 showed IRON walking so naturally on stage that some thought it was a human in a robot suit, until XPENG's team "cut it open" on stage to prove it was mechanical.

Key technical highlights include:



✓ **Accurate human scale:** 1.78cm tall and 70 kg, designed to operate naturally in human environments.

✓ **Biomimetic structure:** humanoid spine, muscle-inspired actuation, and fully covered flexible skin, described by XPENG as a design "born from within."

✓ **High articulation:** dozens of joints and very high overall degrees of freedom, enabling smooth walking, stable balance, and natural full-body motion.

✓ **Human-proportion hands:** compact harmonic joints enable a near 1:1 hand size with fine motor control (15–22 degrees of freedom per hand, depending on configuration).

✓ **Advanced power system:** XPENG has publicly highlighted the use of **all-solid-state batteries**, aiming for higher energy density and improved safety.

✓ **Automotive-grade AI:** powered by **three proprietary XPENG Turing AI chips** delivering around **3,000 TOPS**, enabling on-device perception, planning, and interaction.

✓ **Physical-world AI models:** a robot-specific intelligence stack (VLM, VLA, and VLT) designed for real-world action rather than text-only reasoning.

WHY IT MATTERS

XPENG represents a new archetype in humanoid robotics: **automotive companies moving into embodied AI**. This matters because humanoids face their biggest bottlenecks not in prototypes, but in **scale, reliability, data, and manufacturing**—areas where XPENG already has deep experience.

EXTREME ANTHROPOMORPHISM IS NOT A COSMETIC CHOICE. XPENG ARGUES THAT HUMAN-LIKE STRUCTURE:

- Reduces the need to redesign workplaces and public spaces
- Improves task transfer across environments
- Makes human motion and behavior data directly usable for training

XPENG’S APPROACH ALSO DIRECTLY ADDRESSES TWO OF THE INDUSTRY’S MOST COMPLEX PROBLEMS:

- **Training data:** XPENG has built an embodied-intelligence data factory in Guangzhou, adapted from its autonomous-driving data pipelines.
- **System integration:** IRON benefits from XPENG’s full-stack self-research capability across chips, models, software, and hardware.

Strategically, IRON positions XPENG alongside Tesla as one of the few companies globally attempting to unify **vehicles, humanoids, and physical-world AI** on a single platform—while benefiting from China’s supply-chain speed and cost structure.

COMMERCIAL TRACTION

IRON has moved beyond the concept stage, but remains in early deployment:



INTERNAL USE

XPENG is deploying IRON in its own electric-vehicle assembly environments to test manipulation, navigation, and reliability.



INDUSTRIAL PARTNERSHIP

Baosteel has been announced as an ecosystem partner, with IRON used to explore inspection and intelligent-manufacturing scenarios.



COMMERCIAL FOCUS (EARLY)

guided tours, customer service, and structured public environments where interaction and safety matter more than heavy labor.



PRICING

current reported price around US \$150,000, targeting enterprise and early industrial adopters.



ROADMAP

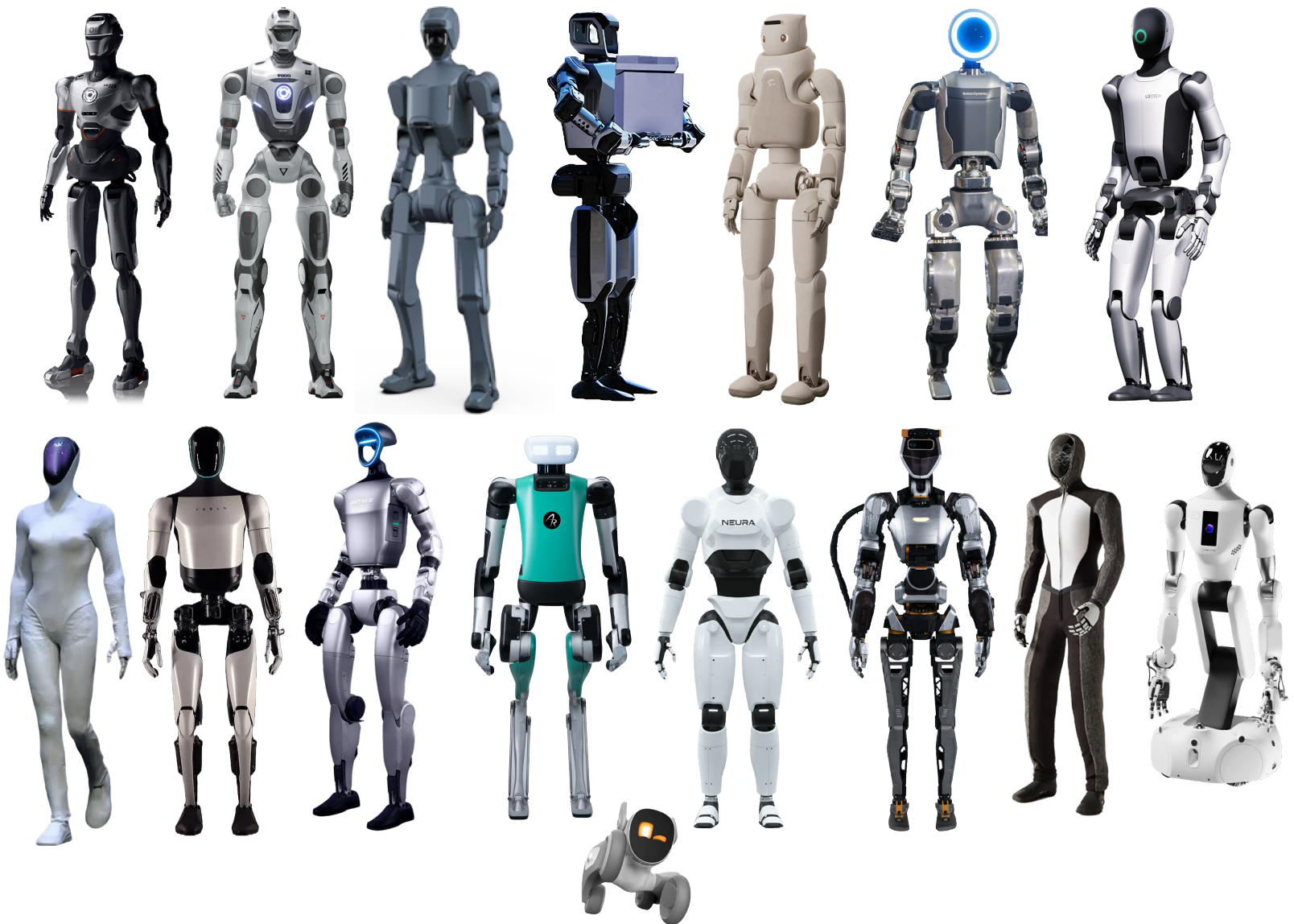
XPENG has publicly stated an ambition to achieve large-scale mass production by the end of 2026, framed as a goal rather than a guarantee.

IN SUMMARY

Across these 15 profiles, we see humanoid robotics transitioning from research to real-world impact. Chinese firms dominate in manufacturing scale and fast deployment, American and Canadian players push AI and platform approaches, and European entrants focus on safety and collaboration.

Each has carved a niche – whether it's warehouse drudgery, eldercare assistance, or cutting-edge agility. As we move through 2026, these emerging leaders are racing to combine reliability, intelligence, and cost-effectiveness.

The competitive landscape suggests we'll soon witness humanoids not as one-off demos but as actual products and services integrated into business operations and daily life. This shift is already underway with open reservations, commercial orders, and real-world pilot deployments across multiple industries this year.



A woman with blonde hair in a braid, wearing a red zip-up top with white and black striped sleeves and waist, is speaking into a microphone. She is gesturing with her hands. The background is a solid red color.

KEYNOTE SPEECHES

WHO IS INSPIRING YOUR TEAM TO FEEL, THINK, AND ACT DIFFERENTLY?

Ashley doesn't just talk about China trends. She shows innovation in action. How AI is reshaping retail. How consumers are driving disruption. How businesses are applying tech on the ground. Not just theory – but what's working right now.



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04

WHAT MAKES CHINA'S HUMANOID ROBOTICS ECOSYSTEM UNIQUE

National Strategy Anchored in
Industrial Policy

World-Class Industrial Supply
Chain Integration

AI and Hardware Co-Development
in Close Proximity

Real-World Pilots and Deployment
Feedback Loops

Scale of Domestic Market Demand
and Deployment Environments

Ecosystem Outcomes

WHAT MAKES CHINA'S HUMANOID ROBOTICS ECOSYSTEM UNIQUE

China's surge in humanoid robotics is not an isolated fad; it is the emergent outcome of a deeply interconnected technological, industrial, and policy ecosystem that short-circuits many structural barriers that slow progress in other markets.

As early as 2025, China had already established itself as the world's largest humanoid robotics hub, with dozens of companies bringing market-ready machines into real environments and an increasingly visible global footprint that extends far beyond concept demos.

At the core of this ecosystem are interlocking pillars — dense supply chains, coordinated public policy, localized AI-hardware co-development, and real-world deployment feedback loops — that reinforce each other and accelerate what others call “the next generation of labor automation.”

4.1

NATIONAL STRATEGY ANCHORED IN INDUSTRIAL POLICY

China has made humanoid robotics a strategic priority, with national guidelines setting goals for mass production and a globally competitive ecosystem. As of 2026, China has over 140 manufacturers and 330+ product models, and released its first national standard system covering the full industry chain.

These guidelines are not mere slogans; they anchor actual resource flows toward:

- ✓ prototype industrialization
- ✓ core component supply chain security
- ✓ pilot integration in real workplaces

This top-down alignment contrasts with most other markets, where robotics innovation remains primarily private-sector driven and often lagging behind clear commercialization pathways.

4.2

WORLD-CLASS INDUSTRIAL SUPPLY CHAIN INTEGRATION

China's unique industrial base anchors its robotics advantage. Unlike most countries, where critical humanoid components (high-torque actuators, precision harmonic drives, rare-earth magnet motors, and servo systems) are imported or partially localized, China now controls a **large majority of the global humanoid robotics component supply chain**.

This supply chain integration yields multiple advantages:

- ✓ **Cost compression:** localized manufacturing of critical parts drives unit costs down steeply.
- ✓ **Rapid iteration:** prototyping and production flows occur in the same geographical clusters.
- ✓ **Component choice & redundancy:** multiple domestic suppliers reduce single-source risk.

The result is not just lower prices — China now produces humanoid platforms with cost profiles that are dramatically different from those of Western peers, enabling thousands of units to be economically justified where competitors still struggle to reach volume manufacturing.



4.3

AI AND HARDWARE CO-DEVELOPMENT IN CLOSE PROXIMITY

In China, AI and robotic hardware development do not evolve in isolation. In key tech hubs such as Hangzhou and Shenzhen, humanoid robotics firms and AI labs work in close collaboration — geographically and organizationally.

For example, Hangzhou's tech ecosystem includes AI leaders (the so-called "Six Little Dragons") such as DeepSeek and Unitree, which drive innovation in both large-scale models and embodied control systems.

This proximity means AI models for reasoning, perception, and motion control are trained concurrently with hardware prototypes. Instead of importing intelligence modules as afterthoughts, Chinese developers optimize them for physical imperfections and real-world noise, creating an iterative learning cycle rarely seen outside China.

4.4

REAL-WORLD PILOTS AND DEPLOYMENT FEEDBACK LOOPS

Perhaps the most distinctive feature of China's humanoid ecosystem is its **deployment-centric iteration model**. Robots are trialed in live factory floors, logistics centers, retail environments, and even public spaces.

The recent World Humanoid Robot Games in Beijing, featuring hundreds of competitors and real task scenarios, symbolize a culture that turns competition into operational data, not just spectacle.

Every real-world interaction — whether in a warehouse aisle or a mall corridor — becomes a data point feeding back into design, control logic, and AI models. In contrast, many Western companies treat public pilots as marketing events rather than serious "data providers."

4.5

SCALE OF DOMESTIC MARKET DEMAND AND DEPLOYMENT ENVIRONMENTS

China's industrial and commercial base itself is a gigantic live environment for humanoid robotics. With the largest installed base of industrial robots globally and rapidly diversifying automation needs across logistics, manufacturing, and service sectors, China provides an immediate local demand pool that justifies early deployment even before global export strategies mature.

This demand fuels a self-reinforcing cycle: pilots become scale deployments, which generate data, which drives refinement, which attracts further investment.

4.6

ECOSYSTEM OUTCOMES

As of 2026, these factors have converged to produce measurable outcomes:

- ✓ humanoid robotics entered scaled production—Unitree targets 10,000 – 20,000 units in 2026;
- ✓ domestic component supply chains captured major manufacturing value, with core component localization exceeding 70%;
- ✓ local policy frameworks reduced commercialization risk — China released its first national standard system for humanoid robotics in February 2026, unifying technical specifications across the industry.

The net effect is a dynamic ecosystem that privileges deployment, empirical learning, and cost leadership over theoretical performance metrics. China's humanoid robotics evolution is not just about building robots—it's about building an industrial context where robots become economically meaningful at scale.



EXPERT DIALOGUES

YOUR COMPETITORS ARE ALREADY
TALKING TO INSIDERS. ARE YOU?

Reports tell you what happened. Experts tell you what's happening — and why it matters. Book an expert dialogue and sit down with the people building China's AI models, robotics systems, and cutting-edge technologies. One conversation. Direct access. No filters.



GET IN TOUCH TO CONNECT WITH AN EXPERT

05

THE FIVE BUSINESS MODELS EMERGING IN 2026

1 Robots-as-a-Service (RaaS): Turning CapEx Into OpEx

2 Industrial Task Automation Bundles: Selling Outcomes, Not Robots

3 Retail and Consumer Engagement Robots: Monetizing Attention and Experience

4 Healthcare and Eldercare Robotics: Augmenting, Not Replacing Care

5 Education and Developer Ecosystems: Platform Economics in Physical Form

Why This Matters for Enterprises

THE FIVE BUSINESS MODELS EMERGING IN 2026

As humanoid robots move from pilots to production, the winning companies will not be defined by hardware alone. They will be defined by business models that absorb risk, shorten payback periods, and integrate cleanly into enterprise operations. In 2026, five dominant models are emerging, each aligned to specific buyer needs and deployment realities.

5.1

ROBOTS-AS-A-SERVICE (RAAS): TURNING CAPEX INTO OPEX

RaaS is becoming the default entry point for enterprise humanoid adoption.

Instead of purchasing robots outright, companies pay a monthly or per-task fee that bundles hardware, software, maintenance, and updates.

This model works because humanoids remain operationally complex. Most enterprises do not want ownership risk tied to battery degradation, model obsolescence, or changes in safety certification.

RaaS shifts risk upstream to the robotics provider while lowering adoption friction for buyers.

For customers, the value lies in predictability. Costs align with usage. Deployment can scale gradually.

RaaS performs best in:



Warehousing



Manufacturing support



Inspection and patrol tasks

In 2026, RaaS is emerging as the dominant way businesses adopt humanoids, especially in industries with tight margins like logistics. It lowers risk: companies can pilot robots without a huge investment and expand usage only after seeing ROI.

For robot companies, RaaS provides recurring revenue and closer customer relationships (they can continuously gather data to improve the product).

5.2

INDUSTRIAL TASK AUTOMATION BUNDLES: SELLING OUTCOMES, NOT ROBOTS

In industrial settings, enterprises are not buying humanoids. They are buying **task elimination**.

This model bundles humanoid robots with:

✓ Task-specific tooling

✓ Workflow integration

✓ On-site training

✓ Data dashboards

Pricing is often linked to a defined scope: pallet inspection, line-side material movement, equipment checks, or night-shift patrols.

This model is attractive because it avoids open-ended autonomy promises. The robot only needs to perform a narrow set of high-value tasks reliably. Logistics hubs, energy facilities, and large factories prefer this structure. It mirrors how industrial automation has historically scaled.

In 2026, as humanoids prove themselves, integrators and OEMs partner to offer these “bundled automation cells.” Companies prefer this because they get a single point of contact and accountability. It’s similar to how many factories buy robot arms today: not one arm, but a welding cell or painting cell.

Now humanoids will be the core of new cells for tasks like kitting, assembly, or packaging. The bundle model also helps with internal sell: it’s easier for a manager to approve “automation of palletizing line 3 for \$Z” with clear ROI, than to justify “purchase of 3 humanoid robots” in abstract. Vendors who master specific use-case bundles will have an edge.

5.3

RETAIL AND CONSUMER ENGAGEMENT ROBOTS: MONETIZING ATTENTION AND EXPERIENCE

Retail humanoids operate under a different economic logic. Their value is not labor replacement. It is **engagement amplification**.

THESE ROBOTS ACT AS:

- Front-of-house greeters
- Product guides
- Brand ambassadors

Revenue justification comes from increased dwell time, conversion lift, and brand differentiation, not cost savings.

THIS MODEL WORKS BEST IN:

- Flagship stores
- Malls
- Airports
- Museums

In 2026, successful retail humanoids integrate tightly with loyalty systems, CRM platforms, and digital signage. They become physical interfaces for existing data ecosystems. This model remains sensitive to novelty fatigue. Robots must evolve behaviorally to retain value.

For instance, imagine a clothing store where a humanoid mannequin not only models outfits but also greets customers, helps them find sizes, and offers style advice (via AI). The store might pay a monthly fee for this robot, which is less than the cost of a human employee, and it doubles as novelty entertainment, drawing in curious shoppers.

Restaurants could employ humanoid waiters to take orders and deliver food; theme parks might have humanoids roaming as interactive characters.

These customer-facing bots often follow a **“service lease” model** – the vendor provides the robot, maintenance, and periodic content updates (like seasonal dialogue scripts, new dances etc.), and the business pays a subscription.

5.4

HEALTHCARE AND ELDERCARE ROBOTICS: AUGMENTING, NOT REPLACING CARE

Healthcare and eldercare humanoids operate under constrained but defensible economics. They are not replacing nurses or caregivers. They are extending capacity.

Use cases focus on:

✓ Patient interaction

✓ Mobility assistance

✓ Monitoring and companionship

✓ Rehabilitation support

Buyers include hospitals, care facilities, and municipal programs. Procurement cycles are long, but contracts are sticky once deployed.

In 2026, this model increasingly rely on public-private partnerships. Regulatory compliance and safety certification are decisive factors. The commercial logic is driven by demographic pressure rather than efficiency alone.

For example, a nursing home might subscribe to a “robot care assistant” service: for a fee, they get a humanoid that can help transfer patients from bed to wheelchair (reducing staff back injuries), deliver meals and medications room to room, and monitor patient safety (alerting nurses if someone falls).

5.5

EDUCATION AND DEVELOPER ECOSYSTEMS: PLATFORM ECONOMICS IN PHYSICAL FORM

This model mirrors early personal computing and smartphones. Humanoids become platforms rather than finished products.

Companies sell:

✓ Developer-ready humanoids

✓ SDKs and simulation tools

✓ Training datasets

✓ Curriculum partnerships

Revenue comes from hardware sales, software licensing, and ecosystem lock-in. Universities, research labs, and startups are the primary customers. The goal is not immediate profit but long-term standard setting.

In 2026, humanoid platforms that attract developer mindshare will shape application standards and control downstream value.

Think of app stores but for robots: a retail company could download a “store inventory audit” app for their humanoid, or a home user could download a “yoga coach” personality.

The business model here is **developer ecosystems** – maybe revenue sharing on apps or selling development licenses. This requires a user base, which might first be enterprise, then consumer as home robots emerge.

WHY THIS MATTERS FOR ENTERPRISES

These models determine who captures value as humanoids scale. Hardware leadership alone will not win.

Enterprises must decide:

- ✓ Where to pilot
- ✓ Which model aligns with ROI expectations
- ✓ How much autonomy risk to absorb

Humanoid adoption in 2026 is less about technology readiness and more about commercial structure. The companies that understand these models early will shape how humanoids enter real workflows — on their terms, not the vendor's.



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If you're ready to learn for China — and learn from China — let's talk.

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