

HUMANOID ROBOTICS

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HUMANOIDS: THE DAWN OF A TRANSFORMATIONAL DECADE FOR INDIA AND THE WORLD

Is we witness the dawn of humanoid robotics, the world is quietly preparing for a technological shift that will feel as significant as the arrival of the smartphone—or perhaps even the internet itself. What was once science fiction is rapidly becoming commercial reality, and for investors and startups alike, this moment represents a rare window of asymmetric opportunity.

Humanoid robots are not just machines. They are a universal interface—systems that can walk, perceive, reason, and work in human environments without needing the world to change for them. When technology adapts to us instead of us adapting to it, scale becomes inevitable.

Globally, the momentum is undeniable. Multi-billion-dollar capital flows, aggressive pilot deployments, and exponential improvements in AI are compressing the timeline for mass adoption. And while the US, China, Korea, and Europe lead today, India's entry into this domain is one of the most exciting chapters yet to unfold.

India's humanoid ecosystem is still young, but its trajectory is unmistakable. From iHub Robotics exporting semi-humanoids to the Middle East, to Reliance-backed Addverb unveiling new prototypes, to IIT and BITS labs nurturing homegrown talent—what we're witnessing is the beginning of a domestic capability that can stand on the global stage.

And for a country like ours, where labor-intensive industries coexist with rising automation needs, humanoids aren't replacing jobs—they are augmenting productivity, strengthening supply chains, and enabling businesses to scale beyond traditional constraints.



Offitten by, CA MAYANK DESAI

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Partner, Y.B. Desai & Associates

But perhaps the most meaningful shift is what this means for the investment community. We often talk about "next-wave" and "deep-tech" opportunities. Humanoids represent both. The sector sits at the confluence of AI, hardware, materials science, cloud infrastructure, and simulation. This creates a rich landscape where:

- · component suppliers,
- · actuator and sensor makers,
- Al stack providers,
- cloud-data companies,
- and end-application startups

all have room to build enduring value.

For investors, the upside isn't limited to betting on the humanoids themselves—it extends across the entire supply chain. In every technological revolution, adjacent industries have often created more wealth than the primary category. The same holds true here.

For startups, this is perhaps the most inspiring era to build. Robotics is hard. Hardware is harder. But the world is now aligned: better funding, accessible infrastructure, government encouragement via Make in India, and a global appetite for cost-effective solutions. Indian entrepreneurs have a unique advantage—we understand scale, frugality, and diverse real-world use cases better than most economies.

The next decade belongs to founders who are bold enough to build and investors who are brave enough to believe early.



HUMANOIDS: WHEN ENGINEERING MEETS INTELLIGENCE - AND HUMANITY BENEFITS

Building a humanoid is not just another technological upgrade. It is a technological marvel. Few creations in human history demand such a deeply multidisciplinary effort where mechanical engineering meets computer science, neuroscience meets design, material science meets psychology, and ethics quietly watches from the corner.

A humanoid is not just hardware with software. It is motion, intelligence, perception, decision-making, and interaction - all coexisting in a single form built to function in a world designed for humans. For decades, this vision remained aspirational. The mechanics existed, but intelligence lagged. The bodies were possible; the brains were not. That changed with the advent of AI.

WHY AI TURNED HUMANOIDS FROM CONCEPT INTO REALITY

Earlier robots followed rules. Modern humanoids operate on understanding. Advances in Alespecially in machine learning, computer vision, speech processing, and decision systems - have given humanoids something unprecedented: the ability to perceive, adapt, and respond in real time.

Al enables humanoids to:

- interpret human language and intent
- · recognize objects, spaces, and emotions
- learn from experience instead of fixed programming
- navigate uncertainty rather than collapse under it



Offritten by,

MR. KASHYAP PANDYA

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When combined with breakthroughs in sensors, actuators, lightweight materials, energy systems and precision motors, the result is no longer science fiction. Humanoids now move more naturally, respond more intelligently, and interact more safely than ever before. Not perfectly. But sufficiently. And that sufficiency changes everything.

THE REAL PURPOSE OF HUMANOIDS: NOT REPLACEMENT, BUT REINFORCEMENT

There is a common misunderstanding that humanoids are meant to replace humans. That assumption misses the point. Humanoids are not designed to take over what makes us human. They are designed to relieve humans from what drains them.

They don't replace creativity - they remove exhaustion that kills it.

They don't replace empathy - they handle the load that burns it out.

They don't replace judgment - they provide information and consistency to support it.

How Humanoids Will Make the World a Better Place

1. By Giving Humans Time, Energy, and Dignity Back

Humanoids excel at tasks that are repetitive, physically demanding, precision-heavy and endurance-based. By taking over these roles, they free humans to focus on problem-solving, creativity, connection & leadership. A better world begins when people are less tired and more present.

2. By Transforming Healthcare and Caregiving

In healthcare and elder care, humanoids will assist - not replace - professionals. They can lift and transfer patients safely, monitor vitals continuously, assist mobility without fatigue & follow protocols flawlessly. This allows doctors, nurses, and caregivers to focus on what truly matters - reassurance, empathy, human judgment & ethical decision-making. Care becomes more humane when caregivers aren't pushed to their limits.

3. By Making Dangerous Work Safer

There are environments humans shouldn't have to risk their lives in disaster zones, mining and heavy industry, toxic or high-radiation sites, space and deep-sea exploration. Humanoids will enter first. Not as replacements, but as protective extensions of human effort. Every life saved by reducing unnecessary risk is technology fulfilling its highest responsibility.

4. By Removing Bias Where Consistency Matters

Humanoids don't bring ego, fatigue, or favoritism into execution. In roles involving inspections, compliance, monitoring and rule-based enforcement, they offer neutrality and consistency. Humans still define values and make final decisions. Humanoids ensure those decisions are carried out fairly and reliably.

5. By Supporting Emotional Gaps, Not Replacing Relationships

Humanoids may provide companionship for the lonely, structure for those needing stability & patience where human bandwidth is limited. They won't replace relationships, but they can prevent isolation. Not love. Not attachment. Support. And sometimes, that support becomes a bridge back to human connection.

THE QUIET TRUTH ABOUT HUMANOIDS

Humanoids are not trying to become human. They exist so that humans don't have to live like machines. They absorb repetition so we can create. They carry strain so we can care. They provide structure so we can lead with thoughtfulness.

FINAL THOUGHT

The rise of humanoids is not a story of human obsolescence. It is a story of human elevation. A world where technology quietly says: "Let me handle the weight. You focus on being human." That is not replacement. That is augmentation. And done right, it just might make the world a better place.

TERMINOLOGIES



Actuator Systems:

Motors and mechanisms that power humanoid movement.

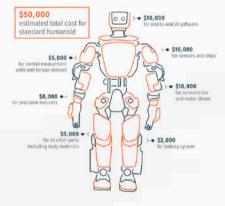
Sensor Fusion:
Combining data from multiple sensors for accurate perception.



HUMANOID ROBOTICS: FROM SCI-FI TO STARTUP REALITY

Humanoid robots are essentially machines shaped like humans, designed to work side-by-side with people. In practice they are bipedal, carrying two legs and usually two arms, with sensors and Al "brains" to perceive and act. These robots can grasp, lift, move containers, or navigate environments built for humans. (Some projects even use wheels instead of legs - for example, Genesis Al's prototype opts for a wheeled base to simplify balance and cost.) The goal is "general-purpose" versatility: assisting in factories, warehouses, homes, or public spaces much like a human worker. Early examples include Boston Dynamics' Atlas (a DARPA project demonstrating dynamic movement and lifting), SoftBank's Pepper (a friendly service bot), and emerging systems from Tesla (Optimus) and Agility Robotics (Digit) that mimic human form.

ESTIMATED TOTAL PRODUCTION COSTS FOR STANDARD HUMANOID ROBOT (2023)



AUTOMAKERS ARE A COMPETITIVE FORCE IN HUMANOID ROBOTICS GIVEN THE CLOSE TIES BETWEEN THE AUTO INDUSTRY AND ROBOTICS



Next Gen Atlas





Optimus v2







	1	
Application		
Size		
DoF		
Speed		
Force		
Availability		

NA - Research	

Multi-Purpose
5'11" , 121 lbs
42
6.5 mph
Extended arm
2024 - 2026*

Toyo	ita
Multi-Pu	rpose
5'0" , 16	5 lbs
32	
NA	1
Finge	ers
NA - Res	earch

Agility Robotics	Figure Al
Multi-Purpose	Multi-Purpose
5'9" , 143 lbs	5'6" , 130 lbs
32	41
3.3 mph	2.7 mph
Extended arm	Fingers
Currently in use	Currently in use

GLOBAL MARKET & FORECAST

The humanoid robotics market is on an **explosive growth path.** Industry research projects a jump from roughly \$2.9 billion in 2025 to \$15.3 billion by 2030 (about a 39% CAGR). Asia-Pacific is expected to lead this surge – countries like China, Japan and South Korea dominate production, and India is ramping up as well. Looking farther out, analysts estimate the total addressable market (TAM) could approach \$4.85 trillion by 2035.

For example, GlobalX calculates \sim \$1.75T from industrial use (35% of a 400M global workforce served by \$10–15K robots) and \sim \$2.8T from home and service robots (selling to \sim 225M households).

Key growth drivers include labor shortages, e-commerce and logistics demands, aging populations (e.g. elderly care), and advances in AI/ML.

- Major market drivers: Shortages of human workers (e.g. warehouse labor), aging demographics needing assistance, and efficiency needs in factories and hospitals. Robotics-as-aservice (RaaS) and falling costs are also pushing adoption.
- Applications: Early deployments focus on industrial logistics: e.g. Agility Robotics' Digit helps move heavy totes in Amazon warehouses, and Figure Al's humanoids are being piloted in BMW's auto plant for assembly tasks. Service sectors (healthcare, hospitality, retail) are just beginning pilots (like SoftBank's Pepper greeting customers). Household robots (cleaning, companion bots) remain mostly R&D, expected in the 2030s as tech matures and costs drop.

GLOBAL LEADERS POWERING THE HUMANOID REVOLUTION

The humanoid robotics landscape today is a highstakes race, driven by both established giants and cutting-edge deep-tech startups.

Across the US, Europe, China, Korea, and Japan, companies are racing to build robots capable of working safely alongside humans.

The Pioneers

- Boston Dynamics: Creator of the iconic Atlas robot, designed for complex industrial and mobility tasks.
- Tesla: Developing Optimus, positioned as a lowcost, mass-manufacturable general-purpose assistant.
- Toyota Robotics: With decades of robotics R&D,
 Toyota remains a quiet but powerful force in service and mobility robots.

Global Innovators

- SoftBank Robotics: Known for Pepper and NAO
 —robots that helped normalize human-robot interaction in retail and education.
- Korea's ROBOTIS: Robust actuators and the humanoid OP Series make them popular in research and education.
- China's UBTECH: Maker of the Walker humanoid, with strong momentum in home and commercial settings.
- PAI Robotics (Spain): A rising European player in nimble, adaptive humanoid platforms.

The High-Momentum Startups

- Agility Robotics (USA): Creator of Digit, optimized for warehouse and industrial tasks.
- Figure AI (USA): Aiming to build a safe, generalpurpose autonomous worker.
- Rhoda AI & Genesis AI (USA, 2025): Stealth startups emerging with deep AI-driven humanoid initiatives.

Each of these companies is carving out a niche:

Atlas & Digit focus on industrial mobility,

Pepper/Tara on hospitality, and Optimus on
universal human-like assistance.

VENTURE CAPITAL IS FLOWING — BIG BETS ON A BIG FUTURE

Investors increasingly view humanoids as the next trillion-dollar market.





Mega Funding Highlights



Figure AI: Raised \$1+ billion, attracting tech's top investors.

Rhoda Al

Rhoda AI (2025): Closed \$162.6M seed+round while still in stealth.



Genesis AI (2025): Raised \$105M for its next-gen humanoid R&D.

Industry leaders have also fueled optimism:

- Nvidia CEO Jensen Huang: Humanoid robotics could become "one of the largest industries ever."
- Elon Musk: Believes Optimus could eventually surpass the value of all Tesla automotive divisions combined.

PILOTS, PARTNERSHIPS & REAL-WORLD DEPLOYMENTS

2024–25 marks the shift from **lab demos** to **real deployments.**

Amazon × Agility Robotics





Amazon is deploying Digit robots in logistics operations. Agility is already planning a factory capable of producing **10,000 robots per year** — a major step toward industrial-scale adoption.

BMW × Figure Al





Figure's humanoids will assist in **BMW's Spartanburg, South Carolina** plant under a longterm assembly pilot.

This is one of the first largescale auto partnerships in humanoid history.

SoftBank Robotics



Pepper's widespread service use (retail, hotels, banks) created foundational insights for human-robot communication—even though production ended in 2021.

THE HUMANOID SUPPLY CHAIN IS BOOMING BEHIND THE SCENES

Beyond the big robot brands, a massive ecosystem is rising to support this industry.

Hardware & Components

- Actuator companies (high-torque motors, harmonic drives)
- Battery manufacturers building compact highdensity cells
- Advanced sensor firms (LIDAR, depth cameras, tactile sensors)
- Precision mechanical parts suppliers

AI & Computing

- Reasoning and control software companies
- Vision, SLAM, and manipulation Al stack providers
- Cloud robotics companies enabling remote updates, training & data sync
- Al chipmakers (Nvidia, Intel, Qualcomm) powering onboard compute

Infrastructure & Services

- Data centers
- · Simulation and digital-twin providers
- Safety certification & compliance services

Every humanoid requires powerful computing, rich sensing, and reliable connectivity — making these adjacent industries huge beneficiaries as adoption grows.

INDIA'S HUMANOID ROBOTICS RISE: EMERGING PLAYERS, FUNDING & THE ROAD AHEAD

While global giants dominate headlines, India's humanoid robotics story is quietly gathering momentum. A mix of early-stage startups, research institutions, and large industrial groups is laying the foundation for what could become one of Asia's fastest-growing robotics markets.

A Young but Fast-Accelerating Ecosystem

India's humanoid industry is still in its early innings, but 2024–25 has marked a clear shift from prototypes to actual commercialization.

iHub Robotics: India's Flagbearer

Kerala-based **iHub Robotics** has emerged as one of the country's most promising humanoid manufacturers. In 2025, the company raised ₹4.3 **crore (US\$0.52M)** to establish what it calls "India's largest humanoid manufacturing facility."

Their flagship robot, **Tara Gen-1**, is a semi-humanoid with:

- a human-like torso and arms
- · mounted on a mobile wheeled base

Originally built for hospitality and customerengagement roles, Tara Gen-1 has already been **exported to the UAE and Saudi Arabia,** showcasing India's potential to become an exporter—not just a consumer—of robotics innovation.

This marks one of India's first real-world international deployments of a locally developed humanoid platform.

NEW ENTRANTS & CORPORATE AMBITIONS

Large industrial groups and deep-tech startups are beginning to invest aggressively in humanoids.

Addverb × Reliance: "India's First Humanoid"

Reliance-backed **Addverb**, known for warehouse and logistics robots, unveiled its **first humanoid** in early 2025. While details are still emerging, Addverb's positioning signals that India's largest conglomerates are entering the humanoid landscape.

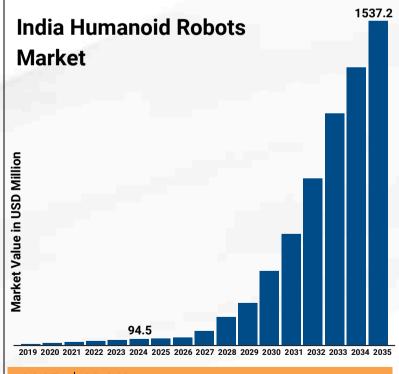
Invento Robotics & Research Labs

- Invento Robotics (Bengaluru), maker of the well-known Mitra robot used in hotels, banks, and hospitals, continues to work on next-generation human-interactive platforms.
- Research institutions like BITS Pilani, IIT
 Hyderabad, IIT Kanpur, and IISc labs are
 building dual-arm humanoid prototypes and
 locomotion projects, creating a deep pipeline of
 talent and IP.

Market Outlook

India Humanoid Robots Market Key Trends and Highlights

- The market valuation for India Humanoid Robots Market is estimated at 94.5 USD Million in 2024.
- From 2025 to 2035, the market is expected to grow at a remarkable CAGR of 28.86%.
- By 2035, the market is anticipated to expand to 1537.5 USD Million, indicating a robust upward trajectory.
- Growing adoption of automation technologies due to increasing demand for efficiency is a major market driver.



CAGR | 28.86%

Growth drivers include:

- rising labor shortages in logistics & hospitality
- Make in India & Digital India incentives
- Al skill development and robotics education
- · domestic manufacturing-friendly policies

Indian Funding Momentum Is Picking Up

Although deep-tech funding in India is still smaller than Silicon Valley, it has grown steadily year-overyear.

Notable Fundraising Milestones

- iHub Robotics: ₹4.3 crore for humanoid manufacturing (2025)
- CynLr (Bengaluru): \$10M in 2024 for multi-arm industrial perception robots
- Additional seed investments flow into robotics hubs in Bangalore, Hyderabad, Pune, Gurgaon, and Chennai

Why This Matters

A stronger funding ecosystem is enabling:

- better hardware prototyping capability
- · access to high-precision manufacturing
- deeper collaboration between academia and industry
- talent retention in India instead of global braindrain

With increasing investor interest and governmentbacked enthusiasm for AI and robotics, India is positioning itself as a meaningful player in the humanoid robotics value chain

OUTLOOK AND INSIGHTS

• Bullish Predictions: Many experts remain optimistic. The fusion of advanced AI (chatbots, vision) with robotics is a research "fast lane," and some predict humanoids will mirror PCs or smartphones in ubiquity over a couple of decades. Tesla hopes Optimus reaches a \$20K price-point at launch, which would dramatically broaden adoption. Plans are underway in multiple countries to put robots in eldercare, classrooms, and even as first responders in disasters.

- Hype vs. Reality: Despite excitement, caution is warranted. As a recent analysis notes, "big funding does not guarantee success" the leap from lab demo to rugged, affordable product is still steep. Key technical hurdles remain (battery life, safe human interaction, fine motor skills). Observers warn not to conflate AI hype with plug-and-play robotics; building fully useful humanoids will take years of iteration.
- Opportunities: Investors and partners should look across the ecosystem. Any technology that makes humanoids better or cheaper is in play: Al software platforms, machine-learning for dexterous manipulation, lightweight sensors, and modular manufacturing methods. Additionally, service models like robot-as-aservice (RaaS) are emerging – companies may lease or share fleets of humanoids rather than requiring outright purchase.
- Future Trend: In the near term (2025-2030), expect humanoids to spread slowly in controlled (factories, logistics settings centers, exhibitions). From 2030 onward, breakthroughs Al and mass-production could usher humanoids into retail, hospitality, and even homes. Asia (especially India) will aim to capture a share of this growth, leveraging local manufacturing and a huge potential user base. In sum, humanoid robotics is transitioning from sci-fi lore to investment reality - with billions pouring in and thousands of engineers at work, the next 5-10 years will be critical in separating winners from vaporwar

TERMINOLOGIES



Real-Time Localization:

Tech that allows robots to understand their position instantly.

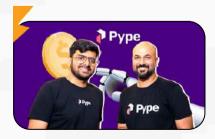
FUNDING NEWS & UPDATES



LightSpeed Photonics raises \$6.5 Mn led by pi Ventures: LightSpeed Photonics raised \$6.5M in a pre-Series A round led by pi Ventures, taking its total funding to \$8.5M. The company will set up an R&D facility and strengthen OEM and ODM partnerships as it moves toward commercialising its optical interconnects for data centres. Founded in 2021, LightSpeed builds compact, energy-efficient optical solutions for AI, HPC, telecom, and edge computing.



Accel and Google partner to co-invest up to \$2 Mn in Indian AI startups Accel and Google have teamed up to launch a co-investment programme for early-stage Indian AI startups through Accel's Atoms accelerator and Google's AI Futures Fund. Selected startups will receive up to \$2M, plus Google Cloud credits, Gemini/DeepMind access, and mentorship. The 2026 cohort targets India-built or Indian-origin AI ventures, reflecting growing global interest in India's AI ecosystem.



Pype Al raises \$1.2 Mn in pre-seed round led by Kalaari Capital to enhance its Al-driven healthcare communication platform and expand into the US. Founded in 2024, the startup builds voice-based Al agents for scheduling, follow-ups, and 24/7 patient support. Already deployed in India, Pype Al automates 85% of patient queries and is integrating with major US health systems.



Al research startup Redrob secures \$10 Mn in Series A round Redrob has raised \$10M in a Series A round led by Korea Investment Partners, taking its total funding to \$14M. The startup will use the capital to build a low-cost ML architecture, develop LLMs for India's 22 languages, and expand its Al suite for learning and productivity. Redrob also plans free LLM access for Indian universities and broader multilanguage support by 2026.



CtrlB raises \$2.5 Mn in seed round led by Chiratae Ventures to scale its diskless data lake platform and accelerate R&D. The company will expand in India and the US, grow its team, and pursue patents and security certifications. Founded in 2023, CtrlB unifies logs, metrics, traces, and security events, targeting 50+ enterprise customers across sectors over the next 18 months.



Axirium Aerospace raises \$3.5 Mn in seed round led by Shastra VC and BEENEXT to expand capacity and strengthen engineering capabilities. Founded by former TASL leaders, Axirium focuses on precision machining, sheet-metal fabrication, and structural sub-assemblies for global aerospace OEMs. The startup aims to leverage India's growing role as a reliable aerospace manufacturing hub amid global supply-chain shifts.



AI 2041 - TEN VISIONS FOR OUR FUTURE

Al 2041 is a brilliant blend of storytelling and strategic analysis that helps readers understand how artificial intelligence—including humanoid robotics—will reshape industries, economies, and everyday life by the year 2041. Written by Al pioneer Kai-Fu Lee and sci-fi author Chen Qiufan, the book presents ten fictional scenarios set in the near future, each followed by a clear explanation of the underlying technologies.

WHY THIS BOOK MATTERS FOR STARTUPS & INVESTORS

For anyone building or evaluating companies in AI, robotics, automation, and deep tech, AI 2041 provides something rare: a clear window into markets that will open, industries that will transform, and behavioural shifts that will define the next two decades.

It breaks down how AI will power humanoid assistants, personalised robots, autonomous services, robo-healthcare, and smart economies. For investors, the book highlights where capital will flow; for founders, it reveals where opportunities will emerge.

Key Takeaways (Relevant to Humanoid Robotics)

1. Humanoids will become everyday companions:

The book discusses how AI agents will evolve into physical robotic forms that can support caregiving, education, hospitality, and personal tasks.

This aligns closely with today's humanoids (e.g., Tesla Optimus, Figure 01).

2. Robotics + AI = New labour markets:

Al 2041 explains how humanoid robots will complement human workers instead of just replacing them.

3. Regulation will shape billion-dollar opportunities:

Kai-Fu Lee shows how the rise of humanoids will also require new laws around safety, ethics, privacy, and autonomy—an untapped area for regulation-tech startups.

4. Robotics becomes a service industry (RaaS):

The book predicts Robotics-as-a-Service becoming mainstream. Investors will see subscription-based models for humanoid deployments across malls, airports, schools, hospitals, and manufacturing.

5. Massive impact on emerging markets:

India, Southeast Asia, and Africa are highlighted as regions where AI and robotics adoption will leapfrog, creating fresh startup ecosystems around humanoid manufacturing, operations, and localised AI.

WHY YOU SHOULD READ IT

Unlike technical textbooks, Al 2041 is easy to understand, highly engaging, and immediately useful.

For anyone considering investments in humanoid robotics, Al automation, and futureof-work startups, this book acts as a practical foresight guide.

It answers the big questions:

- What industries will humanoid robots disrupt first?
- How will economies change when humanoids become affordable?
- What startup opportunities will emerge in the next decade?
- How should investors evaluate Al-led businesses?

Al 2041 is essential reading for founders and investors who want to build in the age of Aldriven humanoid robotics.

The book doesn't just predict the future—it explains how to participate in it. If your audience is exploring the intersection of AI, robotics, and entrepreneurship, this book fits perfectly.

By Kai-Fu Lee & Chen Qiufan

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Embodied AI:

Al that interacts with the physical world like a human.

Bio-inspired Engineering: Designing robots based on human anatomy.





Dexterous Manipulation:

Ability of humanoids to handle complex objects.

Torque Control: Fine-tuned force control for precise movements.



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Cognitive Robotics:

Robots that can think, learn, and reason.



Like LLMs but for physical actions in real world..





Behavior Cloning:

Training robots by mimicking human actions.

Reinforcement Learning:

Robots learning through trial and reward.





Human-Robot Interaction (HRI):

Natural communication between humans and robots.



Global angel investment platform, empowering startups by providing growth capital and connect.

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