

SmartTech Research paper, published July 2026 by Brett Faulk, contributor

Physical AI Robotics Market

| Featuring an Agility Robotics case study

How the first company to put humanoid robots to paid work reveals where the broader autonomous-robotics market is heading — and why the business model is as important as the machine.



SmartTech Research



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1. Executive Summary

Agility Robotics is the first company in history to put humanoid robots to paid, productive work. In late 2024 its bipedal robot, Digit, began moving totes under a commercial Robots-as-a-Service (RaaS) contract at a GXO Logistics facility operating for Spanx in Georgia. That was the first revenue-generating humanoid deployment anywhere. By mid-2026 Digit has logged hundreds of thousands of hours of real warehouse work across customers including GXO, Amazon, Schaeffler, Mercado Libre, and Toyota, with roughly 100 units in the field.

Agility's progress is a strong real-world signal of a market inflection: after decades of demos, physical AI (autonomous, embodied robots that sense, reason, and act in the physical world) is crossing from pilots into production. This paper keeps Agility's journey at the center while situating it inside the worldwide robotics and physical-AI market: its size and growth from 2020 through 2025, the forecast for 2030, and the breakdown by form factor, industry segment, and use case.

Key Findings at a Glance

- Baseline market sizing: the total AI-robotics market grows from ~\$108B (2023) to ~\$303B (2030) (roughly tripling at ~16% CAGR) on a broad bottom-up definition spanning all form factors and 18 industries.
- Humanoids are the fastest-growing form factor (~39%+ CAGR) but still the smallest — ~\$2.9B in 2025 versus a \$15B–\$165B range of 2030+ forecasts. Drones, surgical/medical robots, and Autonomous Mobile Robots (AMRs) are far larger today.
- Physical AI scales more slowly than digital: indexed to its take-off, digital AI software grew ~4× faster than robotics over its first decade (21.8× vs 5.8× by Year 11). Atoms and the “sim-to-real” gap are more difficult than bits, which rewards companies that solve deployment, like Agility.
- Scope: 'core robotics' is ~\$50B in 2025, but a broad physical AI definition (incl. drones, surgical, consumer/home, and military) is ~\$142B (2025) → ~\$303B (2030) across 18 industries. Breakouts in this analysis use the broad scope. ~36% of the physical AI market is (recurring) software + services.
- Pricing reality check: implied hardware ASP is ~\$116k (humanoid 2025) → ~\$37k (2030) vs ~\$21k (AMR). 2025 humanoid sizing is optimistic. Tesla's ~\$20k Optimus target and 1M+/yr ambition sit far outside consensus.
- As of mid-2026, only about a half-dozen companies have humanoids in genuine commercial (paying-customer) deployment; Agility Robotics is the most mature and the only one with multi-customer recurring RaaS revenue.
- Demand is driven primarily by structural labor shortages: ~150%+ warehouse turnover and ~\$84B/yr in U.S. workplace-injury costs. Early adopters report 2–3× throughput gains and 40–60% injury reductions on target tasks.
- Agility's defensible edge is commercial, not just technical: the Robot-as-a-Service (RaaS) model, a beachhead 3PL channel (GXO), a 10,000-unit/yr factory (RoboFab), and a 2026 OSHA-recognized safety milestone.

Bottom line: Most people treat the humanoid race as a technology contest. Right now, it's just as much a race to reach paying customers, and that's the race Agility is winning.

2. Market Context

This section defines the physical AI market, sizes it from 2020–2025, forecasts growth through 2030, and breaks the market down by form factor, industry segment, use case, and demand driver. Because independent research firms define the category differently, figures may be presented as ranges with named sources rather than single-point estimates.

2.1 What counts as “Physical AI” / autonomous robotics

Physical AI (also called embodied AI) refers to machines that combine artificial intelligence with a physical body to perceive their surroundings, make decisions, and act in the real world. It spans several overlapping form factors:

- **Industrial robots** — the large, fixed arms that weld, paint, and assemble in factories.
- **Collaborative robots (cobots)** — arms designed to operate safely next to people.
- **Autonomous mobile robots / Automated guided vehicles (AMRs / AGVs)** — self-navigating wheeled or tracked platforms. Beyond moving goods through warehouses, they now also handle service, delivery, cleaning, and hospitality work in hospitals, stores, and on sidewalks.
- **Aerial drones (UAVs)** — flying robots for inspection, mapping, delivery, and defense. Combined across commercial and military use, this is the single largest robot form factor by revenue.
- **Surgical & precision arms** — teleoperated, multi-arm systems used for surgery and laboratory automation (e.g., Intuitive's da Vinci).
- **Consumer robots** — home and yard autonomous mobile robots such as robot vacuums and lawn mowers.
- **Humanoid robots** — general-purpose bipedal robots built to work in spaces designed for humans. Agility Robotics' Digit robot is in this segment.
- **Ground, marine & legged robots** — defense unmanned ground vehicles (UGVs) and unmanned surface/underwater vehicles (USVs/UUVs), plus quadrupeds such as Boston Dynamics' Spot robot.

What makes this relevant strategically: the same advances behind generative AI (foundation models, multimodal perception, reinforcement learning, cheaper edge compute) now give robots enough generality to work in unstructured, human environments, not just on fixed, pre-programmed lines.

2.2 Total market size & growth — the baseline

This paper works from one consistent baseline: a broad, bottom-up model of the total AI-robotics market, resolved into eleven non-overlapping form-factor segments (Figure 4). On that basis the market grows from ~\$108 billion in 2023 to ~\$303 billion by 2030, roughly tripling at a ~16% CAGR. The broad definition spans arms (industrial, collaborative, and surgical/precision), autonomous

mobile robots (commercial and consumer), aerial drones, ground (UGV) and marine vehicles, humanoids, quadrupeds, and specialized defense robots.

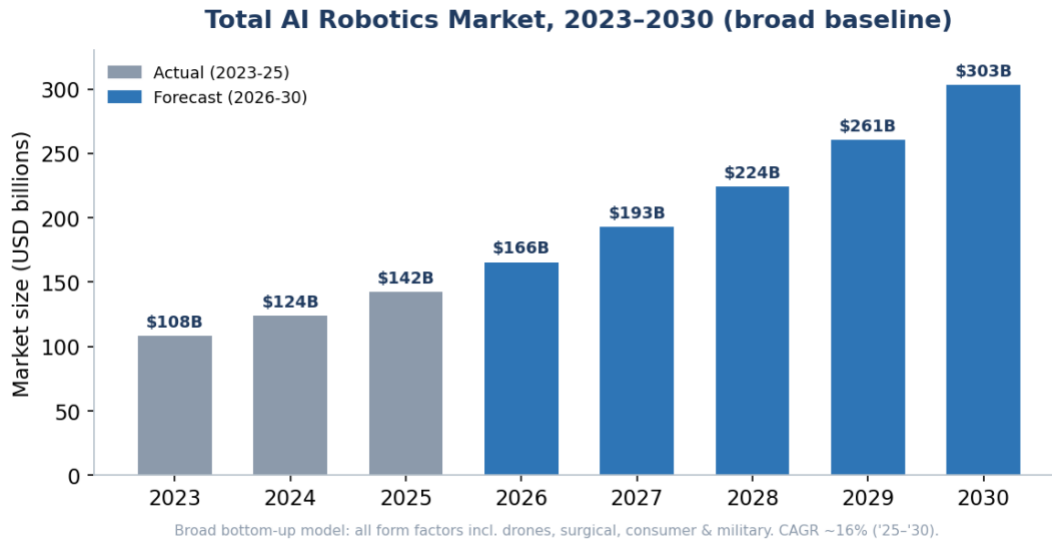


Figure 1. Total AI-robotics market, 2023–2030 (broad baseline) built bottom-up from eleven form-factor segments.

Year	2023	2025	2030	CAGR '23–'30
Market size (\$B)	~\$108B	~\$142B	~\$303B	~16%

A note on scope, and why other headline numbers look smaller. Published third-party ‘robotics market’ figures use narrower definitions and aren’t used as the baseline here. A narrow ‘core robotics’ definition (industrial, mobile, and core service robots only) lands at roughly \$50B in 2025, about a third of our baseline, because it leaves out drones, surgical/medical, consumer, and military. The difference is mainly scope: narrower reports exclude categories such as drones, surgical robots, consumer/home robots, and military systems. This paper uses the broader definition throughout.

Scope	2025	2030	What's Included
Core robotics (narrow, published)	~\$50B	~\$111B	Industrial, mobile, core service
Broad physical AI (baseline)	~\$142B	~\$303B	+ drones, surgical, consumer, military

These figures include recurring software and services revenue, not just robot hardware. Decomposing the broad market reveals roughly **64% hardware, 11% software, and 25% services** mix. The services share is concentrated in surgical robots (where recurring instruments and services are ~70% of revenue), drones (inspection, mapping, delivery), and military (sustainment and C4ISR, the multiple functions supporting military operations).

Market Composition (broad)	Hardware	Software	Services
Share of 2025 revenue	~64%	~11%	~25%

2.3 Digital AI vs physical AI — relative scale

Set physical AI next to digital AI (the software-and-services AI market of foundation models, enterprise software, and cloud AI) and the gap in scale is stark. For the same years, digital AI is far larger and compounding faster in absolute dollars. **The physical world is harder and slower to automate than bits:** robots need hardware, training on both simulated and real-world data, safety certification, and on-site deployment, each carrying real marginal cost. Software scales at almost zero.

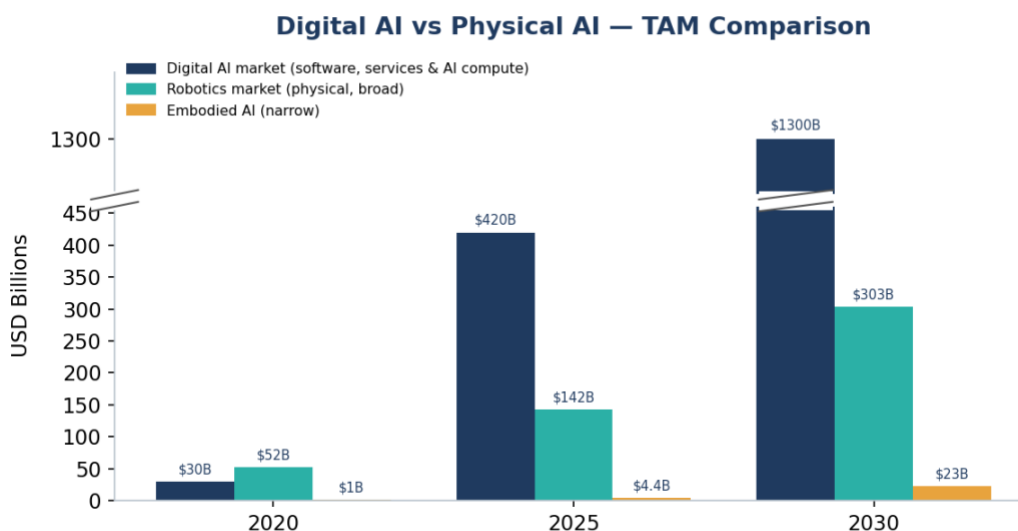


Figure 2. Digital AI vs the Physical AI robotics market. Embodied AI = the AI software / “brain” inside robots (perception, planning, control), excluding the robot hardware.

Year	Digital AI (SW, services & compute)	Robotics Market (broad market definition)	Embodied AI (narrow market definition)
2020	~\$30B	~\$52B	~\$1B
2025	~\$420B	~\$142B	~\$4.4B
2030	~\$1,300B ¹	~\$303B	~\$23B
CAGR '20-'30	~46%	~19%	~37%

1: Digital AI 2030 estimates span ~\$1,240B–\$1,380B.

The comparison highlights three important points: (1) digital AI was smaller than robotics in 2020, then quickly overtook it; (2) digital AI is roughly 95× larger than the narrow embodied-AI software layer today; and (3) digital AI is compounding much faster than robotics overall. That gap is where the opportunity sits. It’s also why Agility stands out: it solved commercialization instead of waiting for the technology to mature.

How fast is each scaling? Comparing levels understates the more interesting question: indexed to each market's take-off, how do the growth curves compare? Setting digital AI's commercial take-off at 2015 and physical AI's at 2020 – while acknowledging NVIDIA CEO Jensen Huang's March 2026 claim the “ChatGPT moment for robotics is here” – and normalizing each to its Year-1 revenue, digital AI compounds dramatically faster.

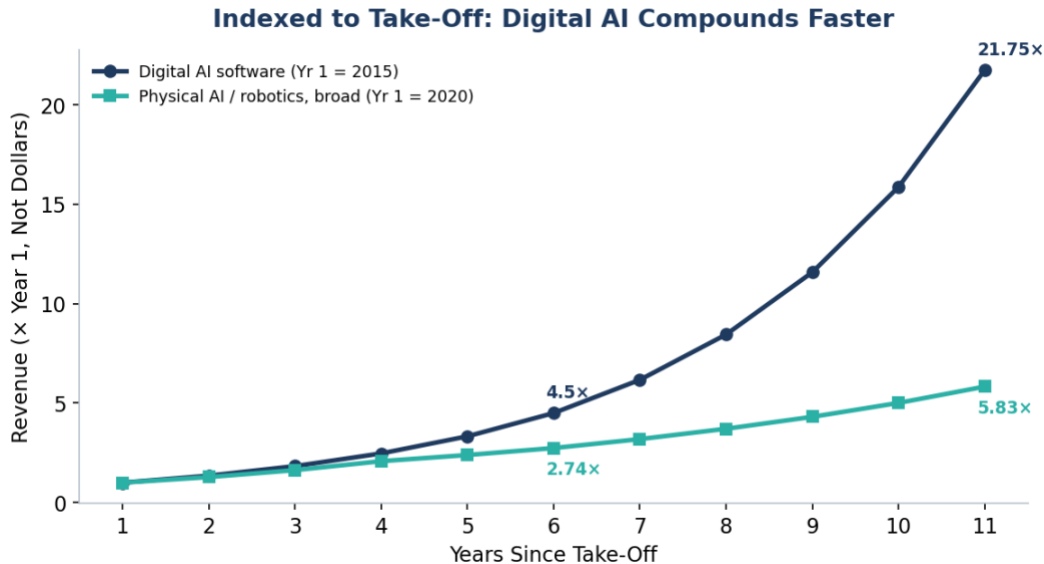


Figure 3. Revenue indexed to each market's take-off year. The Y-axis is a growth multiple ($\times$ Year-1 revenue), not dollars. Digital AI software scaled roughly 4 $\times$ faster than robotics over its first decade.

By **Year 6**, digital AI software had grown to **4.5 $\times$** its Year-1 revenue while robotics reached **2.7 $\times$** ; by **Year 11**, digital AI was at **21.8 $\times$** versus robotics at **5.8 $\times$** . The same pattern holds for the newest S-curves: generative AI grew $\sim 8\times$ in its first four years (2022 $\rightarrow$ 2025) while humanoids grew $\sim 1.9\times$ (2023 $\rightarrow$ 2025). The **difference is structural**: software scales at near-zero marginal cost, while every robot must be built, certified, and physically deployed.

That changes how Agility should be evaluated. When a market scales slowly (because physical products are hard to build and ship), the early winners aren't the most technically capable. They're the ones who crack deployment and get paid. That has been Agility's edge.

2.4 Breakdown by form factor

Figure 4 breaks the market down by robot form factor. In this model, AMR / AGV captures all wheeled or tracked autonomous mobile robots, making it the second-largest form factor ($\sim \$23B$ in 2025). AMR / AGV form factors include warehouse movers plus service, delivery, hospitality, cleaning, and healthcare-logistics mobile robots. Consumer robots (home vacuums and mowers) are autonomous mobile robots too but are shown separately as “Consumer AMR” to keep the home market distinct. Also, military UAVs are combined with commercial drones making aerial drones the single largest form factor ($\sim \$46B$ in 2025). **Humanoids remain the smallest of the major forms today ($\sim \$3B$) but are projected to grow fastest ($\sim 39\%/yr$).**

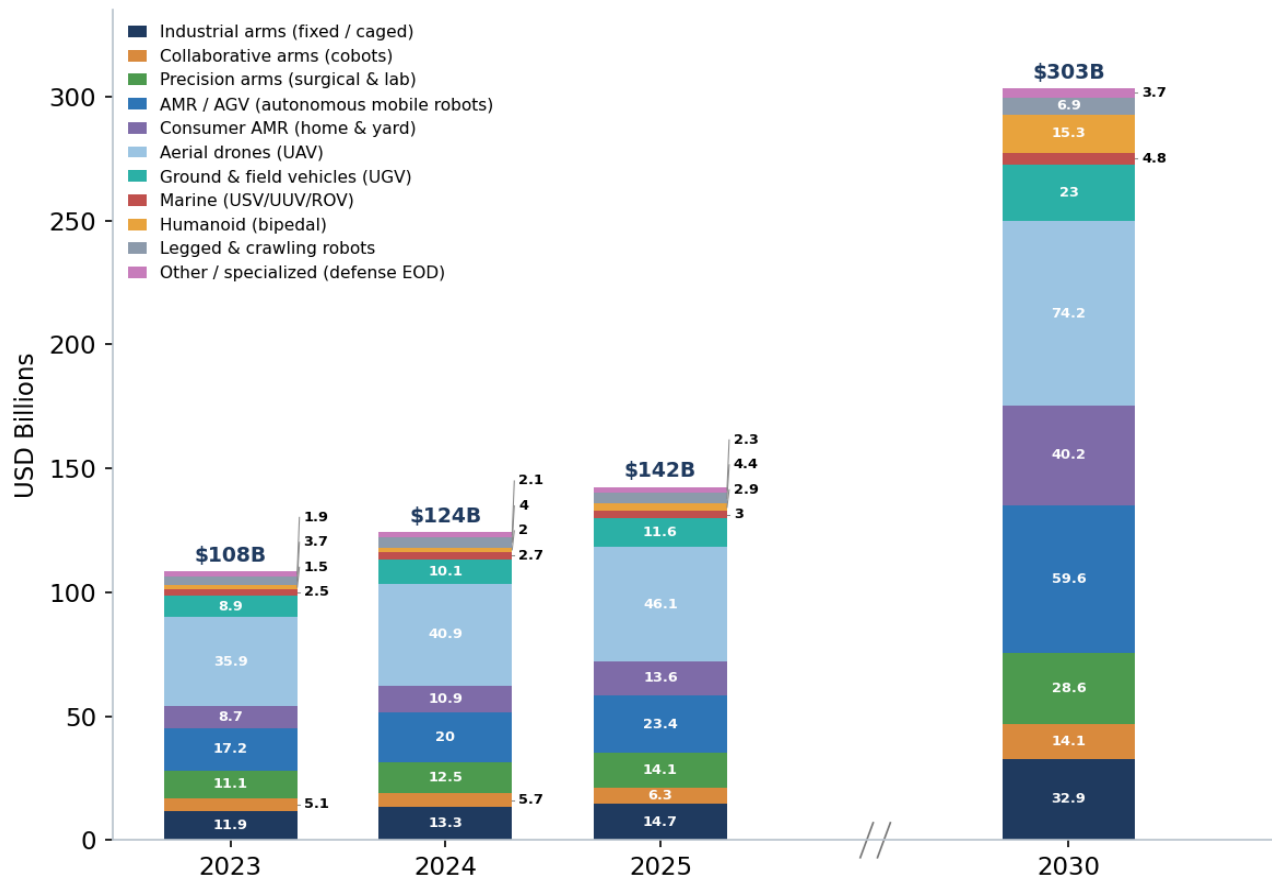
Figure 4. Robotics Market by Form Factor (\$B)

Figure 4. Robotics market by form factor.

Note: Different industry reports use different category boundaries. Drone forecasts in particular range enormously (from ~\$55B to ~\$800B by 2030 depending on the industry forecast).

All figures are total market revenue (hardware + software + services), not hardware-only.

Form Factor (USD, \$B)	2023	2024	2025	2030	CAGR ¹
Industrial arms (fixed / caged)	11.9	13.3	14.7	32.9	17.5%
Collaborative arms (cobots)	5.1	5.7	6.3	14.1	17.5%
Precision arms (surgical & lab)	11.1	12.5	14.1	28.6	15.2%
AMR / AGV (autonomous mobile robots)	17.2	20.0	23.4	59.6	20.6%
Consumer AMR (home & yard)	8.7	10.9	13.6	40.2	24.2%
Aerial drones (UAV)	35.9	40.9	46.1	74.2	10.0%
Ground & field vehicles (UGV)	8.9	10.1	11.6	23.0	14.7%
Marine (USV/UUV/ROV)	2.5	2.7	3.0	4.8	9.9%
Humanoid (bipedal)	1.5	2.0	2.9	15.3	39.2%

Form Factor (USD, \$B)	2023	2024	2025	2030	CAGR ¹
Legged & crawling robots	3.7	4.0	4.4	6.9	9.4%
Other / specialized (defense EOD)	1.9	2.1	2.3	3.7	10.0%
TOTAL (broad scope)	\$108.4	\$124.2	\$142.4	\$303.3	16.3%

1. CAGR is 2025→2030.

2.5 Breakdown by industry segment

Adoption spans 18 industries. The table below shows where AI robots are working today, the lead form factor, and what's driving each. It's ordered roughly by 2025 market size:

Industry	Primary Use Cases	Lead Form Factors	Key Driver
Military & Defense	ISR, fielded unmanned systems (UAV/UGV/USV), EOD	Aerial drones, UGV, Marine (USV/UUV)	Force protection; standoff
Automotive & manufacturing	Line-side material handling, machine tending, welding	Humanoid, Industrial arms, Cobots	Skilled-labor gap; ergonomics
Healthcare & medical	Robotic surgery, hospital delivery, disinfection, eldercare	Precision arms, AMR/AGV, Cobots	10–11M global health-worker gap by 2030
Logistics & warehousing	Tote handling, sorting, palletizing, trailer unload	Humanoid, AMR/AGV	150%+ turnover; \$84B injury
Consumer & home	Vacuuming, mowing, pool cleaning, companions, toys	Consumer AMR	Convenience; aging-in-place
Agriculture	Autonomous tractors, drone spraying/scouting, picking	Aerial drones, UGV, AMR/AGV	Seasonal farm-labor shortage
Security & surveillance	24/7 patrol, thermal/anomaly detection	AMR/AGV, Aerial drones	High guard turnover; coverage cost
Aerospace & defense (mfg/MRO)	Drilling, fastening, inspection, maintenance of aircraft	Industrial arms, Cobots, Legged/crawling robots	Precision; throughput
Energy & utilities	Asset inspection, gas-leak/thermal, gauge reading	Legged/crawling robots, Aerial drones	Aging workforce; hazardous sites
Retail & hospitality	Shelf scanning, restocking, cleaning, delivery	AMR/AGV	Frontline turnover
Construction	Layout, rebar tying, bricklaying, demolition, survey	Aerial drones, Industrial arms, Humanoid (early)	439K US gap ('25); 41% retire by '31
Facilities & cleaning	Floor scrubbing, UV disinfection, window cleaning	AMR/AGV	Low-wage churn
Government & public safety	Police/fire/EMS support, border, inspection, municipal	Aerial drones, UGV, AMR/AGV	Public-sector staffing; safety

Industry	Primary Use Cases	Lead Form Factors	Key Driver
Oil & gas (incl. offshore)	Leak detection, confined-space tube inspection	Legged/crawling robots, Aerial drones	Confined space & explosion risk
Last-mile delivery	Sidewalk/road/air delivery	AMR/AGV, Aerial drones	Driver shortage; cost-to-serve
Mining	Autonomous haulage, underground inspection, drilling	UGV, Legged/crawling robots, Aerial drones	Remote/hazardous; seismic & gas risk
Pharma & laboratories	Sample handling, lab automation, compounding	Precision arms (lab), Cobots	Precision & throughput
Ports & maritime	Container handling, yard AGVs, hull inspection	AMR/AGV, Legged/crawling robots, Aerial drones	Throughput & safety

The military & defense segment is the largest end-market at roughly \$23B or ~16% of the 2025 market, followed by automotive, healthcare, and logistics. **By form factor, aerial drones (commercial plus military UAVs combined) are the largest at ~\$46B**, a product type sold across many industries (see Figure 4). For humanoids specifically, logistics/warehousing and automotive manufacturing remain the clear beachheads; other industries lead with specialized, mobile, or aerial forms today.

2.6 Breakdown by use case & workflow

Across those industries, demand clusters around a recurring set of workflows. The first five are high-repetition logistics/manufacturing tasks early humanoids target; the rest extend across other form factors:

- a) **Tote & container handling** — moving totes/bins between racks, conveyors, and sorting systems (Digit's core task).
- b) **Package sorting & induction** — sorting and inducting parcels onto belts and into chutes.
- c) **Line-side replenishment** — delivering parts and materials to assembly stations on schedule.
- d) **Pick-and-place / machine tending** — picking individual items and placing them into orders, fixtures, or machines.
- e) **Palletizing & trailer unloading** — stacking and wrapping goods onto pallets; unloading floor-loaded trailers.
- f) **Autonomous inspection** — gauge reading, thermal/gas scans, and asset monitoring on fixed routes (quadrupeds or legged robots, drones, crawlers).
- g) **Aerial survey & mapping** — site survey, crop scouting, and infrastructure mapping (drones).
- h) **Cleaning & disinfection** — floor scrubbing and UV disinfection in facilities and hospitals.
- i) **Precision manipulation** — high-accuracy repetitive tasks such as surgery and lab handling.

- j) **Patrol & last-mile delivery** — 24/7 perimeter patrol and short-haul delivery by sidewalk, road, or air.

Figure 5. Market Size by Use Case (\$B)

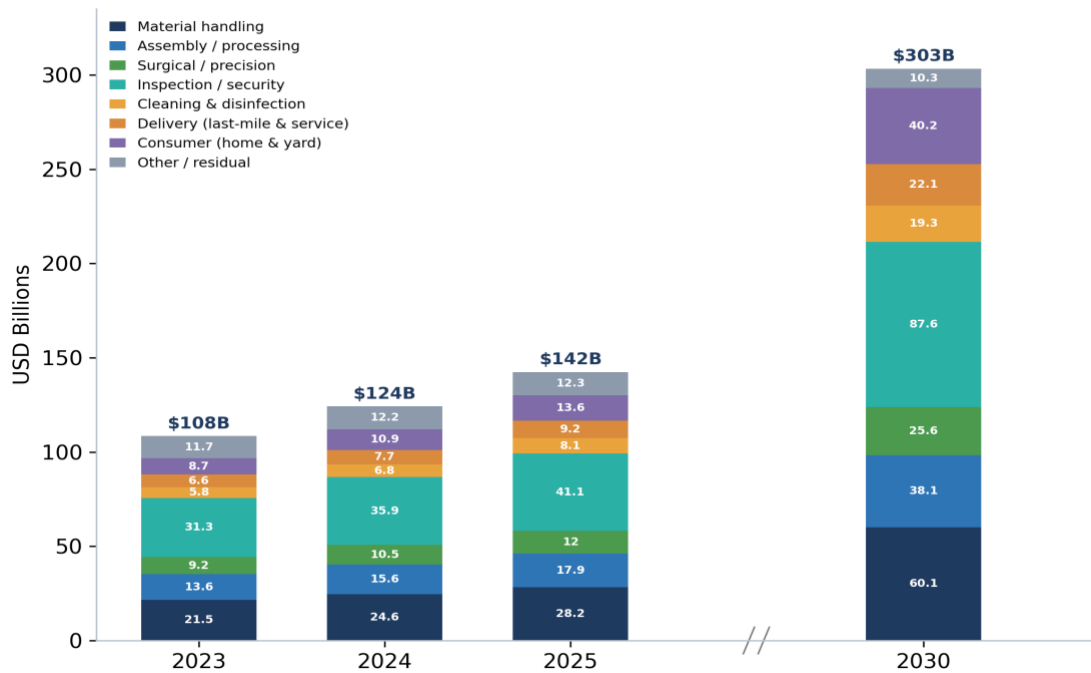


Figure 5. Modeled market size by use case.

2.7 Where it makes sense: dull, dirty & dangerous work

The fastest payback shows up in the “dull, dirty, and dangerous” jobs: work that’s hazardous, contaminated, or so repetitive it drives injury and turnover. Getting people out of harm’s way is often justification enough on its own. Legged and crawling robots for hazardous-environments are already a ~\$4.4B market, growing ~9.4% a year. Real deployments:

Type	Industry	Example Task	Real Deployer
Dangerous	Nuclear	Radiation sensing & inspection in hot zones	Nuclear plants (Boston Dynamics’ Spot robot)
Dangerous	Oil & Gas (offshore)	Gas-leak detection on platforms	BP Mad Dog; Aker BP Skarv
Dangerous	Mining	Inspection where seismic/rockfall/gas risk	LKAB
Dangerous	Petrochemical	Confined-space furnace/tube inspection (~60% entries)	Ethylene cracker operator
Dangerous	Utilities	High-voltage equipment & gauge inspection	Ontario Power Generation
Dirty	Healthcare / Facilities	UV disinfection; sewer & pipe inspection	Hospitals, utilities
Dirty	Agriculture	Pesticide / herbicide spraying	Farms (drones)

Type	Industry	Example Task	Real Deployer
Repetitive	Warehousing	Tote moving & sorting (100K+ totes)	GXO / Agility
Repetitive	Healthcare / Surgery	Repetitive, ultra-high precision surgical motions	Intuitive (da Vinci robotic surgical system)
Repetitive	Food Service	Frying; drink assembly	Miso Robotics

2.8 Pain points & demand drivers

The growth of physical AI is pulled by labor-market economics more than by technology.

Structural pain points dominate the business case:

Driver	Scale of the Problem	How Robots Address It
Labor shortage	Many sectors cannot fill jobs – especially physically demanding roles	Fill roles machines can do continuously
Turnover	100–150%+ turnover in warehousing, food service, security	Reduce dependence on a churning workforce
Workplace injury	~\$84B/yr in U.S. employer injury costs	Take over hazardous, high-strain tasks
Aging workforce	Large number of workers retiring (e.g., ~41% of construction by 2031)	Backfill departing experienced labor and/or support reduced staff
Dangerous environments	Nuclear, offshore, confined-space, high-voltage risk	Remove humans from harm's way

The labor gap is real, and in some industries it's severe:

Industry	Shortage / Turnover Estimate	Source (year)
Healthcare (global)	~10–11 million health-worker shortfall projected by 2030	WHO (2024)
Construction (US)	439,000 additional workers needed in 2025; ~41% retiring by 2031	ABC / AGC; NCCER ('25)
Manufacturing (US)	Up to ~1.9–2.1 million jobs could go unfilled by 2030	Deloitte / NAM ('24)
Trucking (US)	~60K driver deficit ('24) → 80K+ ('25); 90%+ long-haul turnover	ATA est. ('25)
Restaurants / food service (US)	70% of operators have hard-to-fill roles; ~80% annual turnover	Nat'l Restaurant Assn ('25)
Warehousing / logistics (US)	150%+ annual turnover; ~\$84B/yr injury cost	Industry ('25)

Early results are concrete: adopters report 2–3× throughput gains and 40–60% fewer workplace injuries on the tasks they target. The framing (**robots take the hazardous, repetitive work so people move to higher value, judgment-intensive roles**) is also Agility’s core value proposition, which is why Digit’s first job lands right on the market’s single biggest pain point.

2.9 The humanoid frontier — and why forecasts disagree

Humanoid forecasts vary wildly. MarketsandMarkets sizes the market at \$2.9B in 2025, growing to \$15.3B by 2030 (39.2% CAGR). Goldman Sachs projects \$38B by 2035. Fortune Business Insights models \$165B by 2034 (50.6% CAGR). And Morgan Stanley’s long-range scenario reaches \$5 trillion by 2050. The spread is that wide because the outcome hinges on **two unknowns: (1) how fast unit costs fall** (Morgan Stanley reports ~\$200K in 2024 dropping toward \$50K by 2050), **and (2) how quickly enterprises move from pilots to (scaled) deployment.**

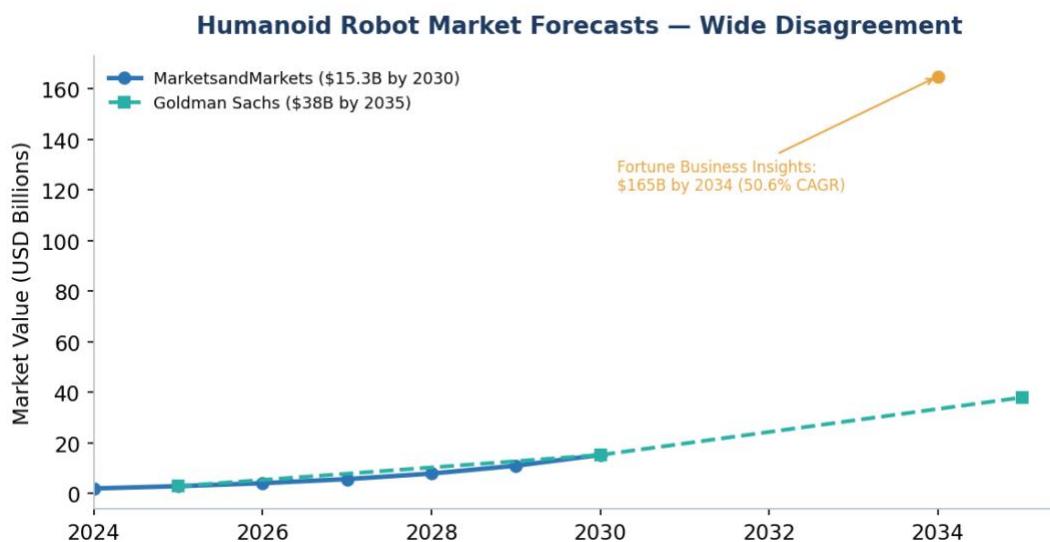


Figure 6. Humanoid robot market forecasts vary significantly, reflecting uncertainty over cost curves and adoption speed.

2.10 What does a robot cost? ASP, pricing & the Tesla question

Dividing market revenue by unit shipments yields an implied average selling price (ASP) which is a useful reality check on the sizing. Because market figures bundle software and services (Section 2.2), the cleanest version computes ASP on **hardware-only** revenue (the market figure × each segment's hardware share) divided by units shipped.

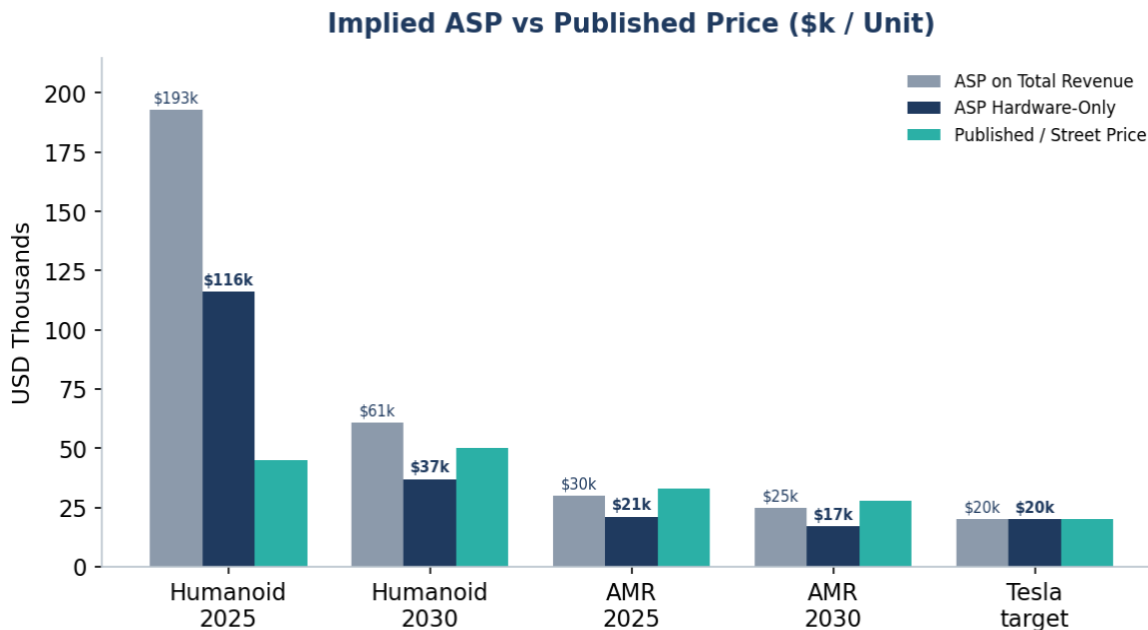


Figure 7. Average Selling Price (ASP) for Humanoids vs AMRs.

The AMR figures reconcile closely with published pricing (\$25–\$40k platforms). The humanoid figures don't: even on a hardware-only basis, the implied 2025 ASP (~\$116k) sits roughly 3× above the volume-weighted street price (~\$35–45k, since ~90% of 2025 units were low-cost Chinese models like the \$16k Unitree G1). The likeliest explanation: **the published 2025 humanoid 'market' figure is running ahead of actual hardware revenue.** That is worth remembering before taking any humanoid forecast at face value. By 2030 the hardware-only ASP (~\$37k) lines up better with industry cost-down targets.

The Tesla Optimus question

Tesla's stated plans sit far outside the consensus on both price and volume. Elon Musk's long-term price target is **~\$20,000** (current build cost is estimated at \$50–100k), and Tesla's unit volume ambition runs from a 2026 target of 50–100k units toward a stated capacity of 1M/yr at Fremont and eventually 10M/yr at Giga Texas.

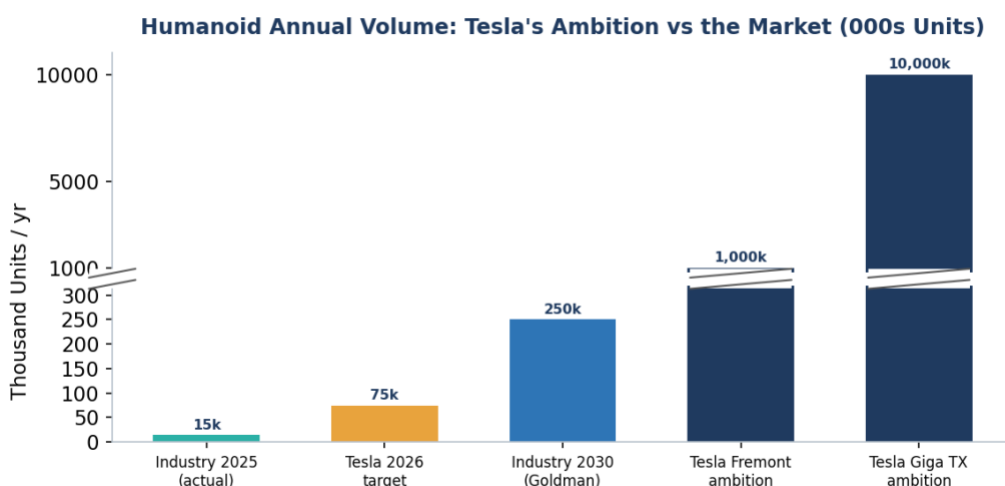


Figure 8. Tesla's stated annual humanoid volume ambition versus the entire industry's actuals and forecast.

Two things stand out regarding Tesla's stated ambition: (1) Tesla's ~\$20k target would undercut even the hardware-only 2030 projected ASP (~\$37k), and (2) its 1M+/yr ambition is 4–40× the entire industry's projected 2030 volume (~250k units). Either Optimus single-handedly resets the humanoid market's price and unit volume curves, or — with no external customers announced and Optimus, by Musk's own admission, 'not in usage in our factories in a material way' as of early 2026 — Musk's ambition may be too aggressive in the near- to mid-term. That highlights the **announcements-versus-delivery gap** between Tesla and Agility: Agility has moved into paid customer deployment; Tesla remains largely in the projection and internal-use phase.

2.11 The commercial-deployment landscape — how many companies?

So, how many companies currently have humanoid robots deployed for commercial use? The honest answer depends on how strictly "commercial" is defined, because the market is full of demos, pilots, and announced deployments.

Using a strict definition — **humanoids doing real work for paying customers in production environments** — the reported count as of mid-2026 is small: roughly six companies. Using a looser bar that includes active paid pilots and early factory deployments, it is closer to 8–12.

Company	Robot / Known Customers	Stage	First Deploy
Agility Robotics	Digit — GXO, Amazon, Schaeffler, Mercado Libre, Toyota	Commercial RaaS (most mature)	2024
Figure AI	Figure 03 — BMW Spartanburg	Production pilot, scaling	2024–25
Appteronik	Apollo — Mercedes-Benz, GXO	Pilot → early commercial	2025

Humanoid Commercial Deployments table, continued

Company	Robot / Known Customers	Stage	First Deploy
Boston Dynamics	Electric Atlas — Hyundai	Early commercial deployments	2026
UBTECH	Walker — NIO, FAW, others	Commercial (China)	2025
Unitree / AgiBot	G1, H1 / units at scale	Volume shipping (mixed use)	2025

About half a dozen companies are estimated to have humanoid robots in genuine commercial, revenue-generating deployment as of mid-2026 — Agility Robotics, Figure AI, Apptronik, Boston Dynamics, and China-based UBTECH, Unitree, and AgiBot shipping at volume into more mixed (research / education / early-industrial) use.

Agility remains one of the most mature with sustained multi-customer recurring RaaS revenue. Tesla (Optimus), 1X, and most others remain in internal-use or demo stages, not paid third-party deployment.

Note: There is no single authoritative registry, and “commercial deployment” is defined inconsistently across sources. Treat this as a well-supported estimate, not a precise count.

3. Company Profile: Agility Robotics

Agility Robotics was founded by Dr. Jonathan Hurst, a Carnegie Mellon and Oregon State University robotics professor, and spun out of OSU in 2015. It is headquartered in Albany, Oregon, and operates **RoboFab**, a purpose-built humanoid manufacturing facility in Salem, Oregon capable of producing 10,000+ units per year. CEO Peggy Johnson (former CEO of Magic Leap and EVP at Microsoft) leads the enterprise commercialization strategy.

Metric	Detail (updated June 2026)
Valuation	~\$2.1B (Series C, 2025)
Total funding	~\$640M raised to date
Manufacturing	RoboFab — 10,000+ units/yr capacity
Fleet deployed	~100 Digit units across customers
Proof point	100,000+ totes moved at a live GXO/Spanx site
Investors	Amazon Industrial Innovation Fund, NVIDIA Ventures, Sony Innovation Fund, DCVC, Playground Global, Schaeffler

4. Product: Digit & Agility Arc

Digit is a 5'9", 140 lb bipedal humanoid with two arms capable of lifting 35 lbs. It uses cameras, LiDAR, and an inertial measurement unit for 360-degree situational awareness, and navigates ramps, curbs, and uneven surfaces that stop wheeled robots. Battery life is up to 8 hours, well beyond the 2–5-hour range of many competitors. The companion software platform, **Agility Arc**, provides enterprise fleet management, remote monitoring, and task orchestration and is the intended long-term high-margin layer of the business. Agility Arc also offers **APIs for integration** with existing IT and building management systems.

Pain points solved

Warehousing and logistics operators face **chronic labor shortages, extremely high turnover, and costly injury claims** tied to repetitive lifting and carrying. Digit is designed to perform exactly those ergonomically hazardous, high-repetition tote-handling tasks, **freeing human workers for higher-value, judgment-intensive roles**. Unlike fixed automation (conveyors, robotic arms), Digit operates in existing human-designed environments with **no facility retrofitting**.

How it works in the field

Digit works alongside humans and AMRs, handling tote transfers between storage racks, conveyors, and sorting systems. At GXO's Spanx facility in Georgia (the first-ever commercial humanoid deployment) Digit moved over 100,000 totes. Agility is pursuing ISO functional-safety certification that would let Digit work in direct proximity to humans without barriers, a milestone no humanoid has yet fully achieved.

5. Business Model Analysis

For product leaders, the lesson from Agility isn't Digit's hardware. It's the **revenue model**. The company runs a dual model: an outright CapEx sale (~\$250K per unit list price) plus **Robots-as-a-Service** (RaaS), a monthly subscription that bundles hardware, software, and support.

Why RaaS

Warehouse operators were unwilling to commit \$250K upfront for unproven technology. RaaS mitigates adoption risk, lowers the barrier to a pilot, and creates recurring revenue, turning a hard capital-equipment sale into an operating-expense decision.

Go-to-market: choosing a beachhead

Agility targeted GXO, a third-party logistics provider (3PL), rather than an end brand like Amazon directly. A **single 3PL go-to-market partner operates many facilities across many clients**, so one partnership unlocks many deployment sites: a deliberate choice that maximized the pace of deployment.

P&L and margin trajectory

RaaS delays revenue recognition but creates stickier, predictable ARR. Hardware carries thin margins; the long-term bet is the **Agility Arc software layer becomes the high-margin engine** as the fleet grows, similar to how Tesla frames software and energy services as higher-margin layers on top of hardware.

6. Value Proposition, Strengths & Risks

Strengths	Risks & Concerns
Only commercially deployed humanoid generating real customer revenue	Narrow use case today: tote handling, not general-purpose
RaaS lowers the adoption barrier vs. \$250K CapEx	~100 units — still a very early, small fleet
Amazon investor validates the logistics use case	Amazon is both investor AND internal competitor
RoboFab can build 10,000+ units/yr — supply is real	Tesla Optimus targets ~50,000 units in 2026
100,000+ totes moved at a live customer site	Unit economics of RaaS unproven at scale
2026 OSHA-recognized safety milestone toward human co-working	Low-cost Chinese OEMs (Unitree, UBTECH) undercut on price
8-hour battery far exceeds 2–5 hr competitors	Labor-displacement narrative will intensify with scale

7. Market Momentum for Humanoids

7.1 Agility Robotics

- **Schaeffler partnership & investment:** Schaeffler (the German bearings and motion-technology group) made a strategic investment in Agility and has been running Digit for several months loading and unloading machine washers.
- **OSHA-recognized safety milestone:** Digit passed an OSHA-recognized Nationally Recognized Test Lab (NRTL) field inspection, a regulatory step toward clearance for direct human collaboration, with ISO functional-safety certification expected within roughly 18 months. It's another move from pilot toward permanent line deployment.
- **Customer expansion:** Live, revenue-generating work now spans GXO, Amazon, Schaeffler, Mercado Libre, and Toyota with Digit running full shifts rather than short pilots.
- **Next-gen hardware:** A new Digit model expected at the end of 2026 will add advanced human-detection sensors.

7.2 Competitive landscape

- **Figure AI:** Figure 03 units are running in a production pilot at BMW Spartanburg (where Figure 02 units supported 30,000+ vehicles; 1,250+ hours; 90,000+ parts moved); there are expansion plans to Leipzig.
- **Boston Dynamics:** Electric Atlas began early commercial deployment at Hyundai, with 2026 production committed to Hyundai and Google DeepMind.
- **Appteronik:** Raised ~\$935M total (adding ~\$520M in 2026); Apollo moving from pilots toward early commercial use with Mercedes-Benz and GXO.
- **Chinese OEMs:** Unitree shipped ~5,500 units in 2025 (targeting 10,000–20,000 in 2026); AgiBot produced its 10,000th humanoid in March 2026 — evidence of Chinese volume scaling at reportedly very competitive prices below \$200K/unit.

8. Product Management Takeaways

1. **Revenue-model design is a product decision, not just a finance decision.** Agility's RaaS model (not the robot itself) is why Digit reached the market. The pricing structure was the unlock.
2. **Beachhead selection matters more than TAM.** Targeting 3PLs (GXO) rather than end brands maximized the initial deployment rate. Start focused and seek out paths for leverage.
3. **Your investor list is part of your competitive positioning.** Amazon's investment is both validation and a conflict of interest. Product leaders must see that tension clearly and plan their BATNA.
4. **Hardware-first businesses need a software-margin story.** The economics become more attractive when recurring software revenue (Agility Arc) scales independently of per-unit production cost.
5. **Deploy to prove, not to scale.** ~100 robots and 100,000+ totes at one live site says more than 10,000 units announced. Proving it at a real site beats hyping it in a press release.

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