RCSV RESEARCH

Robotics Center · Annual Report Series

CANADA · THE 2026 ANNUAL REPORT

State of Robotics 2026: Canada

Hardware, data, and foundation models — how Canada's deep AI research base, government programs, and niche robotics companies are positioning the country in a US-dominated North American market.

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EXECUTIVE SUMMARY · CANADA

Research firepower meets commercial scale-up

> Canada punches above its weight in AI research — Toronto, Montreal, and Edmonton host world-class academic AI programs — but translates this advantage into commercial robotics at a fraction of the rate US peers do. The country's $1.38B market is small but growing faster than the US, with specialized champions in each niche.

The Canadian robotics market reached **$1.38B in 2026**, up 13% year-over-year. Unlike the US, Canada's robotics ecosystem is characterized by **category specialists rather than platform players**: Kinova (assistive and lightweight arms), Clearpath / OTTO Motors (autonomous mobile robots, acquired by Rockwell Automation 2023), Sanctuary AI (humanoids), Robotiq (grippers and cobot tooling), Avidbots (cleaning robots), and Attabotics (high-density warehouse storage — declared insolvency 2024, restructured).

Three forces define Canada's position. First, **AI research density**: the Vector Institute (Toronto), Mila (Montreal), and Amii (Edmonton) form the Pan-Canadian AI Strategy's $443M spine, with robotics-adjacent foundation model research. Second, **specialized commercial depth**: Kinova leads globally in sub-7kg assistive arms; Sanctuary AI's Phoenix is the only Canadian humanoid on the global stage; MDA's heritage in space robotics (Canadarm lineage) underpins emerging orbital and defense programs. Third, **structural capital constraint**: Canadian robotics VC at ~$180M annually is 1/30th of US flows — most Canadian robotics scale-ups eventually raise from US investors or relocate HQs.

MARKET SIZE
$1.38B
Canadian robotics market in 2026, up 13% YoY.

PAN-CANADIAN AI STRATEGY
$443M
Federal commitment to AI research (Vector, Mila, Amii).

KINOVA PRODUCTION
~5K/yr
Units shipped annually — global leader in lightweight assistive arms.

SANCTUARY AI FUNDING
$136M+
Raised to date for Phoenix humanoid development.

ROBOTICS VC 2025
~$180M
Canadian robotics venture capital — 1/30th of US deployment.

CLEARPATH EXIT
2023
Acquired by Rockwell Automation — Canada's largest robotics exit.

THE TALENT PIPELINE ADVANTAGE

Canada produces world-class AI and robotics researchers at a rate disproportionate to its population — Geoffrey Hinton (Toronto), Yoshua Bengio (Mila), Rich Sutton (Amii). The country's challenge is **talent retention**: much of this output flows to US firms (OpenAI, Anthropic, Google, Meta) and US universities. Robotics scale-ups face the same pressure, with Kinova and Sanctuary AI operating against a constant recruiting gravity pulling engineers south.

CHAPTER 01

The Canada Market

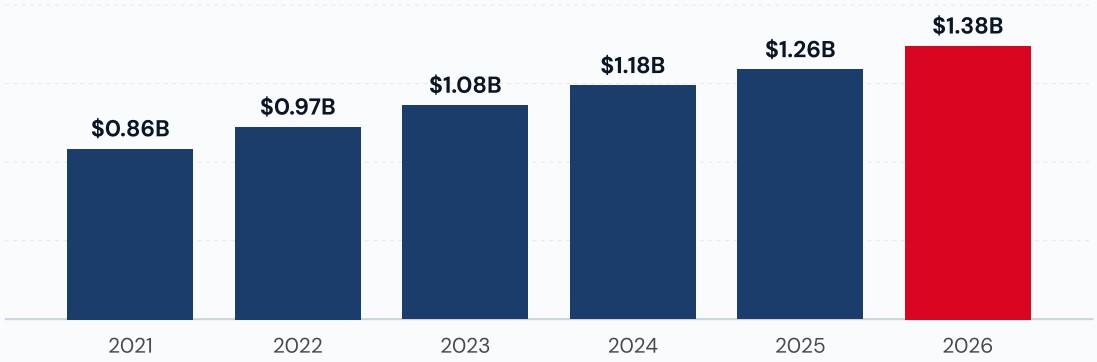
AI research leadership and specialized robotics with outsized academic influence relative to capital deployed.

Market size and trajectory

The Canada robotics market reached **$1.38B in 2026**, growing **+13%** year-over-year. This trajectory reflects the confluence of labor-market dynamics, policy incentives, and foundation-model-enabled deployment velocity discussed throughout this report.

Exhibit 1.1 — Canada Robotics Market Size, 2021–2026

USD billions · total addressable robotics spend (hardware + software + services)



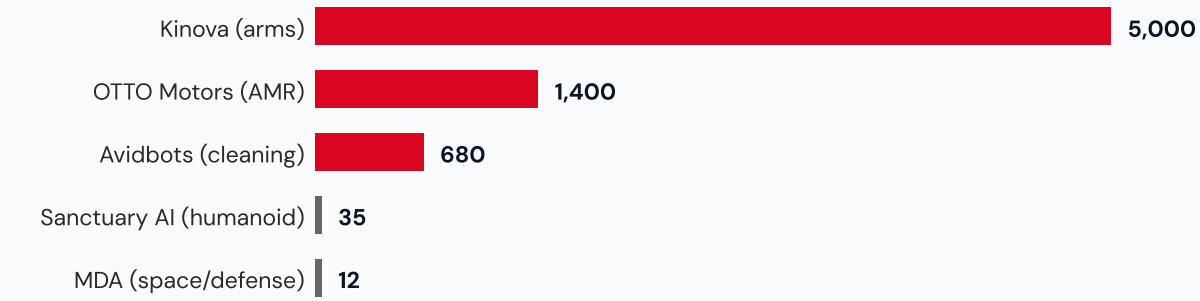
Source: RCSV Research, IFR, Statista, country associations · Estimates for 2026

Shipment landscape

Unit shipments tell a more revealing story than market dollars. Below, Robotics Center's view of the 2025 competitive landscape for humanoid and leading-category robotics in Canada, shown alongside relevant global comparisons where instructive.

Exhibit 1.2 — 2025 Shipment Comparison

Units shipped or deployed in 2025 · leading category players



Source: RCSV Research, company disclosures, Omdia, Counterpoint

CHAPTER 02

National Champions

Every robotics market has its flagship firms — the companies whose trajectory shapes the country's narrative and around which an ecosystem of suppliers, talent, and capital clusters.

Kinova Robotics

Boisbriand, QC

Founded 2006. Gen3, Link 6, JACO assistive arm lines. Link 6 (2022) is the first Canadian-manufactured industrial cobot. Deployed in 30+ countries. ~5,000 units/year production.

Sanctuary AI

Vancouver, BC

Phoenix general-purpose humanoid — Canada's flagship bipedal platform. Carbon AI control system for human-like intelligence. Canadian Tire retail pilot. Targeted at retail, logistics, security.

OTTO Motors (Rockwell)

Kitchener, ON

Formerly Clearpath Robotics; acquired by Rockwell Automation 2023. OTTO autonomous mobile robots for warehouse material handling. ~15% Canadian robotics market share before acquisition.

Robotiq

Lévis, QC

Cobot grippers, force sensors, vision systems. End-effector ecosystem partner for Universal Robots, FANUC, KUKA. Highly profitable niche leader.

Avidbots

Kitchener, ON

Neo autonomous floor-cleaning robot deployed in 15+ countries — airports, malls, warehouses. AI-driven navigation and obstacle handling.

MDA Space

Brampton, ON

Canadarm heritage. Building Canadarm3 for Lunar Gateway. Emerging defense and orbital robotics programs. Public company (TSX: MDA).

A&K Robotics

Vancouver, BC

Autonomous floor cleaning for public transit, airports. Direct competitor/alternative to Avidbots.

CHAPTER 03

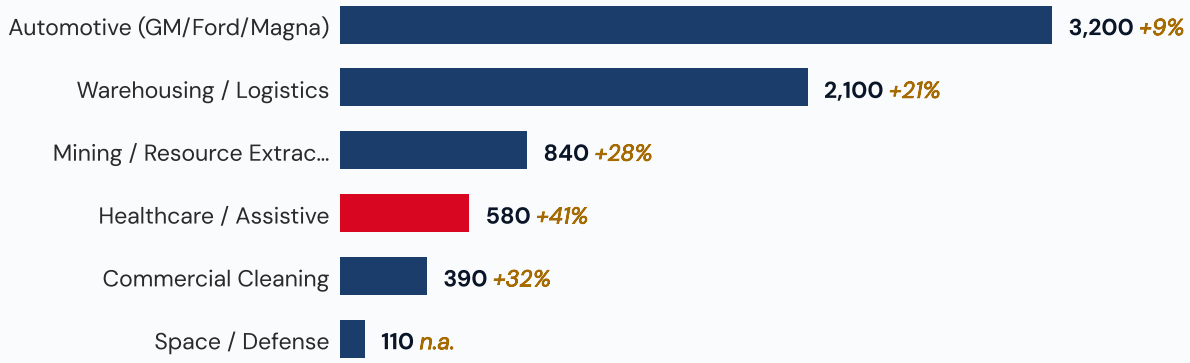
Deployment by Vertical

Where robots are actually working in Canada today — and where growth is accelerating fastest. Robotics Center's estimates reflect operational stock, not cumulative installations.

VERTICAL	DEPLOYED UNITS (2025E)	YOY GROWTH	LEADING FORM FACTOR
Automotive (GM/Ford/Magna)	3,200	+9%	Imported industrial arm
Warehousing / Logistics	2,100	+21%	AMR (OTTO, Attabotics legacy)
Mining / Resource Extraction	840	+28%	Autonomous haul / inspection
Healthcare / Assistive	580	**+41%**	Kinova arms, medical cobots
Commercial Cleaning	390	+32%	Avidbots Neo, A&K
Space / Defense	110	n.a.	MDA Canadarm3, Canadensys

Exhibit 3.1 — Deployed Units by Vertical, 2025 Estimate

Units deployed in commercial / production environments · highlighted bars exceed 35% YoY growth



Source: RCSV Research, IFR, industry associations

CHAPTER 04

Strengths & Challenges

A candid assessment of what Canada does best in global robotics — and where structural vulnerabilities require attention.

Strengths

- **AI research base** — Vector (Toronto), Mila (Montreal), Amii (Edmonton) produce outsized share of foundational ML research. Hinton, Bengio, Sutton — three Turing Award laureates in robotics-adjacent AI.
- **Category specialists** — Kinova in assistive/lightweight arms, Robotiq in cobot tooling, Avidbots in cleaning, MDA in space — Canadian firms lead specific niches rather than compete for platform dominance.
- **US market access** — USMCA, language, regulatory alignment, and proximity make US enterprise sales a natural extension. Canadian companies routinely generate >50% of revenue from US customers.
- **Government programs** — Strategic Innovation Fund, Scientific Research and Experimental Development (SR&ED) tax credit, and Pan-Canadian AI Strategy combine to subsidize R&D at effective rates few peer countries match.

Challenges

- **Capital scale** — Canadian VC robotics deployment is ~$180M vs $4.9B in the US. Scale-ups routinely raise US rounds and relocate HQs (or economic substance) southward.
- **Talent retention** — Canadian-trained PhDs flow to US labs. Vector, Mila, and Amii have partially reversed this, but commercial robotics companies compete against OpenAI, Anthropic, Google for the same engineers.
- **Domestic demand depth** — Canada's manufacturing base is 1/10th the scale of US and 1/30th of China. Insufficient domestic demand for an industrial robotics champion to scale entirely on home-market revenue.
- **No humanoid Tier-1** — Sanctuary AI is Canada's humanoid entry; respected technically but well behind Figure, Unitree, AgiBot on unit shipments and production capacity.

CHAPTER 05

Capital & Investment

The flow of venture capital, strategic corporate investment, and public funding that shapes robotics competitiveness in Canada.

Canadian robotics raised ~**$180M across 24 disclosed rounds in 2025**. Largest rounds: Sanctuary AI ($75M Series B), Avidbots ($38M growth round). Rockwell's 2023 acquisition of Clearpath Robotics (~$600M) remains the largest Canadian robotics exit. Strategic capital increasingly comes from Rockwell, Mitsubishi Electric, and Canadian Tire Corp; Canadian Pension Plan and CDPQ have ramped robotics allocations via fund-of-fund positions.

> **The Data Moat Thesis in Canada Context**
>
> Globally, investors increasingly cite proprietary data collection infrastructure as the primary defensibility argument in robotics. The question for Canada specifically: do its robotics companies generate **deployment-specific data** at a rate that compounds faster than foundation model improvements erode it? This is the question that 2026–2027 will answer.

CHAPTER 06

What to Watch in 2027

Four themes Robotics Center's research team believes will define Canada's robotics trajectory over the next 18 months.

01 · Sanctuary AI Series C

Expected 2026. Will test whether Canadian humanoids can sustain competitive capitalization against Figure, Apptronik, 1X. Benchmark: if raised at <$1B valuation, gap with US widens structurally.

02 · Kinova humanoid entry

Kinova's lightweight arm expertise positions it as a potential humanoid upper-body supplier. Expect partnerships or own platform announcement in 2026–2027.

03 · Space robotics boost

Canadarm3 for Lunar Gateway, Canadensys defense programs, and commercial LEO services create a robotics niche where Canadian heritage is durable. MDA Space IPO performance sets the tone.

04 · Research-to-market conversion

Key question for 2026: can Vector, Mila, and Amii produce commercial robotics spin-offs at a rate commensurate with their research output? Success would re-rate the entire Canadian ecosystem.

> RCSV PERSPECTIVE ON CANADA
>
> Canada's robotics trajectory in 2026–2027 will be defined less by hardware breakthroughs than by **whether the country can convert its distinctive advantages into repeatable deployment outcomes** — at the speed that Chinese and US competitors are setting. The window for structural positioning is narrowing.