RCSV RESEARCH

Robotics Center · Annual Report Series

CHINA · THE 2026 ANNUAL REPORT

State of Robotics 2026: China

Hardware, data, and foundation models — how China's supply chain density, state-backed industrial policy, and EV-adjacent manufacturing base have made it the world's humanoid production capital.

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EXECUTIVE SUMMARY · CHINA

From factory of the world to factory of the humanoid

> In 2025, Chinese companies shipped roughly 80% of the world's humanoid robots. In 2026, that share is projected to rise as Unitree and AgiBot alone target 75,000+ unit annual capacity — more than the entire Western supply combined.

The Chinese robotics market reached **$14.2B in 2026**, up 47% year-over-year — the fastest growth of any major economy. Unit shipments tell an even starker story: Shanghai's AgiBot led the world with 5,168 humanoid units in 2025 (39% global share per Omdia), followed by Hangzhou's Unitree at 5,500 (Unitree's own figure disputes Omdia's second-place ranking). Combined with UBTECH (7% share) and Leju (~5%), **Chinese firms control nearly 90% of global humanoid installations**.

Three forces define China's position. First, **supply chain integration**: the Yangtze River Delta hosts the world's most vertically integrated humanoid supply chain — Unitree manufactures motors, reducers, and sensors in-house; component suppliers (DJI, DeepSeek, EV actuator makers) are within 2-hour logistics radius. Second, **national policy coordination**: the 2025 Humanoid Robot Action Plan, issued by MIIT and five ministries, targets 100,000 deployed humanoids by 2027. Third, **demand-side scale**: BYD (world's largest EV maker), CATL (dominant battery manufacturer), and Foxconn alone represent demand for tens of thousands of systems.

MARKET SIZE
$14.2B
Chinese robotics market in 2026, up 47% YoY.

HUMANOID GLOBAL SHARE
~90%
Chinese firms' share of 2025 global humanoid installations.

UNITREE 2025 SHIPMENTS
5,500
World's top humanoid shipper, per Unitree's own disclosure.

AGIBOT 2025 SHIPMENTS
5,168
Ranked #1 globally by Omdia's Jan 2026 report.

SUB-$10K ARM MAKERS
8 of 14
Chinese share of global sub-$10K arm manufacturers.

HUMANOID MODELS UNVEILED
330+
Distinct Chinese humanoid models unveiled in 2025, per MIIT.

THE SPEED-OF-LIGHT SUPPLY CHAIN

A prototype that takes 12 weeks to produce in the US or Germany is turned around in **10–14 days in Shenzhen**, at a fraction of the cost. The same EV component supply chain that made China the world's largest car manufacturer now serves humanoids — actuators, gears, precision motors can often be repurposed directly between the two.

CHAPTER 01

The China Market

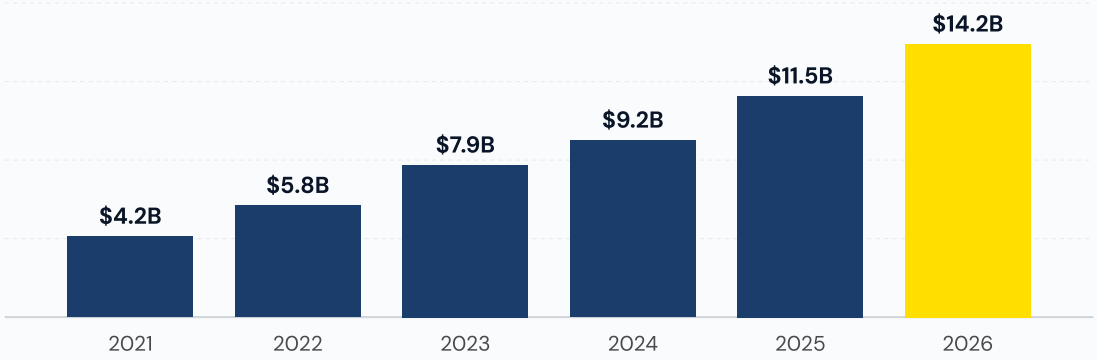
Manufacturing scale, supply-chain vertical integration, and national industrial policy — the gravitational center of global robotics production.

Market size and trajectory

The China robotics market reached **$14.2B in 2026**, growing **+47%** 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 — China Robotics Market Size, 2021–2026

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



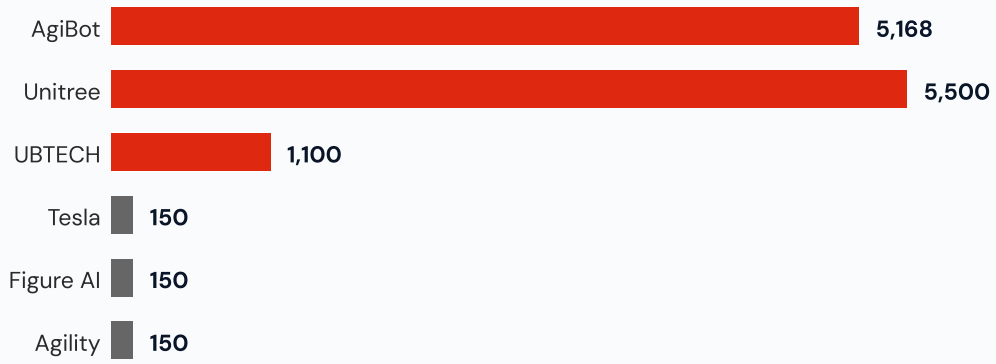
Source: RCSV Research, IFR, Statista, country associations · Estimates for 2026

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 China, 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.

Unitree Robotics

Hangzhou

Founded 2016 by Wang Xingxing. H1/G1 humanoid lineup. G1 priced from $13,500; R1 launched July 2025 at $5,900 — the price-break moment. Targeting 75,000 humanoid + 115,000 quadruped annual capacity. STAR market IPO pending.

AgiBot

Shanghai

Founded 2023. Ranked #1 globally by Omdia for 2025 shipments (5,168 units, 39% share). Expedition A3 reached its 10,000th unit delivery in March 2026. Open-source strategy drives developer adoption.

UBTECH Robotics

Shenzhen

Publicly listed (HKEX). BYD-UBTECH deployment (100–200 units) is the world's largest commercial humanoid installation. Partnerships with Geely, FAW-Volkswagen, BAIC, Foxconn. Walker S humanoid for automotive.

XPENG Robotics

Guangzhou

EV-maker XPENG's humanoid division launched IRON. Leverages XPENG's automotive AI and manufacturing scale. Expected mass production in 2026.

Fourier Intelligence

Shanghai

GR-1 humanoid targeting healthcare and rehabilitation (~$150K pricing). One of the few humanoid systems with documented hospital-floor deployment.

Leju Robotics

Shenzhen

Backed by Tencent. Kuavo humanoid platform. Specializes in educational and research deployments with an emerging industrial pipeline.

CHAPTER 03

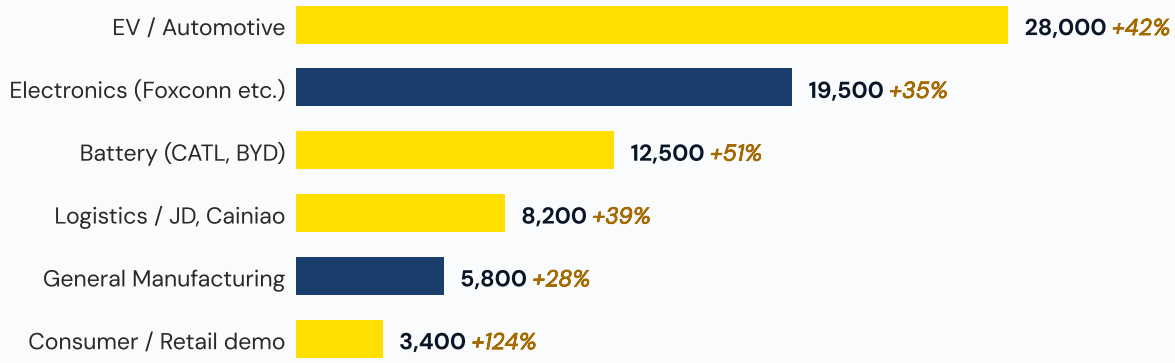
Deployment by Vertical

Where robots are actually working in China 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
EV / Automotive	28,000	**+42%**	Precision 6-DoF + humanoid
Electronics (Foxconn etc.)	19,500	+35%	Bimanual arm system
Battery (CATL, BYD)	12,500	**+51%**	Precision arm + inspection
Logistics / JD, Cainiao	8,200	**+39%**	Mobile manipulator
General Manufacturing	5,800	+28%	Fixed industrial arm
Consumer / Retail demo	3,400	**+124%**	Humanoid (demo/PR)

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 China does best in global robotics — and where structural vulnerabilities require attention.

Strengths

- **Supply chain density** — Yangtze River Delta hosts suppliers, robot makers, AI labs, and EV manufacturers within a 2-hour logistics radius. No equivalent cluster exists globally.
- **Component cost advantage** — China controls ~26% of global actuators, ~60% of rare-earths. Unitree manufactures motors and reducers in-house. The component bill of materials is structurally lower.
- **Manufacturing velocity** — 12-week Western prototype cycles compress to 10–14 days in Shenzhen. Iteration speed is the single largest moat in an industry where product-market fit is still forming.
- **Policy coordination** — Humanoid Robot Action Plan (2025) + 14th Five-Year Plan allocate capital, land, and procurement. Municipal programs (Beijing, Shanghai, Shenzhen) compete to host industry clusters.

Challenges

- **Foundation model gap** — Core VLA research remains US-originated. OpenVLA, Pi0, RDT-1B all emerge from North American labs. Chinese teams are fast-followers, not originators.
- **Export market access** — US policy scrutiny (CFIUS, Entity List) creates uncertainty for Chinese humanoid exports to the US and allied markets. Data handling concerns limit Western enterprise adoption.
- **Brand trust abroad** — Despite performance advantages, Western enterprise procurement cycles still favor Western-headquartered suppliers for mission-critical deployments. Reputation-building takes years.
- **Software and standards** — ROS 2 ecosystem contributions remain disproportionately Western. Chinese firms often integrate Western middleware rather than advance it, a long-term dependency.

CHAPTER 05

Capital & Investment

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

In 2025, Chinese humanoid-related investment reached **39.8B RMB (~$5.5B)** across 325 deals — 326% year-over-year growth. Unitree closed Series C at $3B valuation targeting $7B at IPO. Galbot raised over $300M. First twenty days of January 2026 saw 18 humanoid stocks with net inflows exceeding 100M RMB each. Capital availability is no longer the bottleneck; operational execution is.

The Data Moat Thesis in China Context

Globally, investors increasingly cite proprietary data collection infrastructure as the primary defensibility argument in robotics. The question for China 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 China's robotics trajectory over the next 18 months.

01 · Unitree IPO resets valuations

A successful STAR market listing at $7B valuation would lift the entire Chinese robotics supply chain and likely trigger follow-on IPOs from AgiBot, XPENG Robotics, and Fourier.

02 · Export frictions intensify

Expect new US restrictions on Chinese humanoids in 2026–2027, mirroring semiconductor and EV playbooks. This accelerates rather than blocks domestic demand.

03 · Sub-$5K consumer humanoid

Unitree R1 at $5,900 is the opening salvo. 2027 likely sees sub-$5K consumer-grade humanoids from multiple Chinese firms — a price point that is categorically impossible for Western makers.

04 · Sovereign AI chips

Huawei Ascend and domestic inference accelerators will increasingly replace NVIDIA Jetson in Chinese humanoids. Performance gap is closing; supply is reliable.

> RCSV PERSPECTIVE ON CHINA
>
> China'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.