

RCSV RESEARCH

Robotics Center · Annual Report Series

INDIA · THE 2026 ANNUAL REPORT

State of Robotics 2026: India

Hardware, data, and foundation models — how India's demographic tailwind, PLI incentives, and software-engineering depth are converging into a robotics opportunity just as Make-in-India manufacturing hits inflection.

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EXECUTIVE SUMMARY · INDIA

The awakening of a volume market

India's robotics market grew 17% in 2026 to \$2.14B — the fastest major-economy growth rate outside China. Robot density remains low at ~12 per 10,000 employees (vs. 415 in South Korea), but operational stock has compounded 16% annually since 2016 per IFR, and the working-age population now exceeds China's.

The Indian robotics market reached **\$2.14B in 2026**, up 17% from \$1.98B in 2025 — ranking 5th globally by growth rate. Industrial robot installations set a new record of 4,945 units in 2023 and have grown since, driven by automotive (36% of robot demand) and electronics (29% of industrial robot revenue). Still, the country imports the majority of its robots from Japan, Germany, and South Korea — a dependency that Make-in-India policy explicitly targets.

Three forces define India's position. First, **demographic scale**: the world's largest working-age cohort by 2027, deepest English-speaking technical talent pool, and the globally dominant source of US graduate-level robotics researchers. Second, **policy alignment**: Production Linked Incentive (PLI) scheme, Make in India, and Digital India converge to subsidize domestic robot deployment — particularly in automotive (Tata, Mahindra, Hyundai Chennai) and electronics (iPhone assembly at Foxconn Sriperumbudur). Third, **startup emergence**: Addverb announced a humanoid robot for 2025 production; GreyOrange leads warehouse robotics; Systemantics builds industrial arms. Indigenous capability is nascent but real.

MARKET SIZE

\$2.14B

India robotics market in 2026, up 17% YoY (fastest among top-10).

GROWTH RATE

16%

Annual growth in operational robot stock since 2016 (IFR).

WORKING-AGE POP LEAD

2027

Year India's working-age cohort surpasses China's in absolute size.

PLI SCHEME VALUE

\$26B+

Total PLI scheme allocation across sectors driving automation demand.

INSTALLED UNITS (2023)

4,945

New industrial robot installations — record year.

ROBOT DENSITY

12/10K

Per 10,000 manufacturing workers (vs. 415 in South Korea).

THE DEMOGRAPHIC-SOFTWARE DOUBLE

India is unusual among emerging robotics markets in combining **volume manufacturing demand** (driven by PLI and Make-in-India) with **deep software engineering capability** (the global back-office for robotics R&D). The combination has produced no Tier-1 humanoid company yet — but creates a distinctive opportunity for teleoperation data collection, VLA fine-tuning services, and deployment support roles.

CHAPTER 01

The India Market

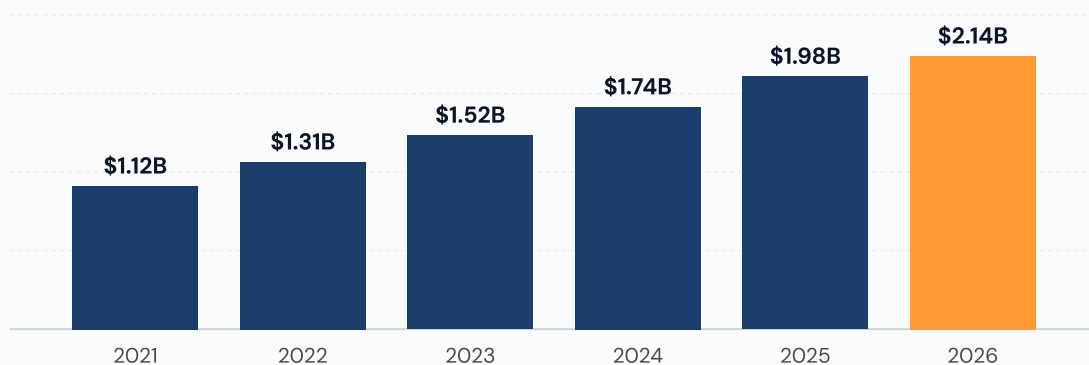
The fastest-growing major robotics market, a rising manufacturing-capable nation, and the world's largest English-speaking robotics engineering talent pool.

Market size and trajectory

The India robotics market reached **\$2.14B in 2026**, growing **+17%** 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 — India Robotics Market Size, 2021–2026

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



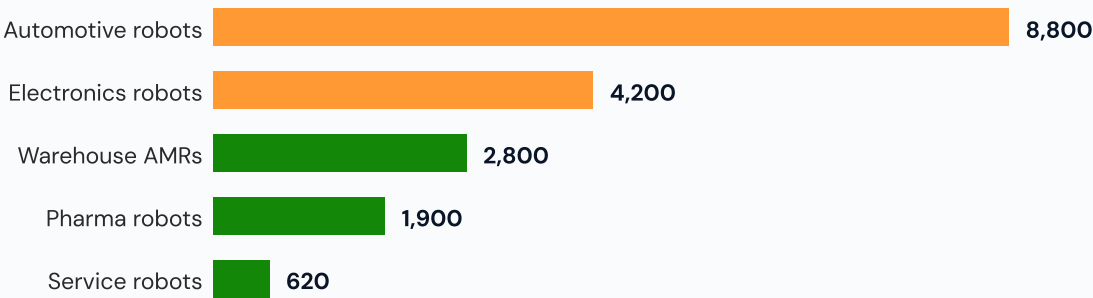
Source: RCSV Research, IFR, Statista, country associations · Estimates for 2026

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 India, 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.

Addverb Technologies

Noida

Warehouse robotics unicorn, backed by Reliance. Announced next-gen humanoid for 2025 with multi-modal AI capabilities. Deployed at 400+ facilities globally. India's most mature robotics export.

GreyOrange

Gurugram

Mobile robots and fulfillment systems. 10,000+ units deployed globally across Walmart, IKEA, H&M. Multi-agent orchestration software (GreyMatter) is core differentiator.

Miko

Mumbai

Educational companion robots for children. Miko 3 shipping in 20+ countries. Consumer robotics success story from Indian engineering.

Systemantics

Bengaluru

6-DoF and SCARA industrial arms manufactured in India. Target customers: Indian MSMEs priced out of imported Japanese/Korean arms.

GenRobotics

Thiruvananthapuram

Bandicoot — a sewer-cleaning robot addressing manual scavenging. Social-impact robotics with government procurement pipeline.

Invento Robotics

Bengaluru

Mitra service robot deployed at airports, hospitals, retail. Pandemic-era telepresence pivot to ongoing customer service deployment.

CHAPTER 03

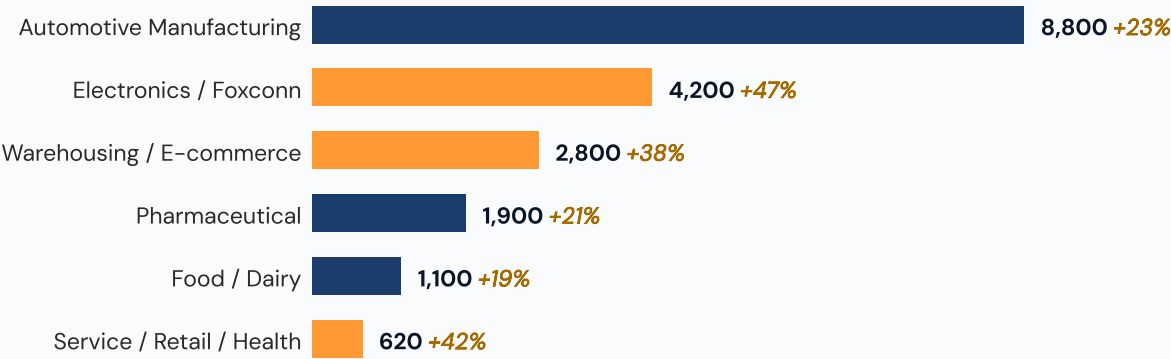
Deployment by Vertical

Where robots are actually working in India 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 Manufacturing	8,800	+23%	Imported industrial arm (FANUC, ABB)
Electronics / Foxconn	4,200	+47%	Precision arm + inspection
Warehousing / E-commerce	2,800	+38%	AMR (GreyOrange, Addverb)
Pharmaceutical	1,900	+21%	Precision arm + lab automation
Food / Dairy	1,100	+19%	Industrial arm + cobot
Service / Retail / Health	620	+42%	Service robot (Mitra, custom)

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

Strengths

- **Engineering talent depth** — Ten million+ STEM graduates annually. IIT system produces world-class control systems, ML, and software engineers. India is the largest non-US contributor to top robotics academic venues.
- **PLI-driven demand** — Production Linked Incentive schemes across automotive, electronics, pharma, and white goods directly subsidize automation investment. \$26B+ in multi-year allocations.
- **English and global integration** — Globally integrated software services sector (TCS, Infosys, Wipro) extends naturally into robotics services — teleoperation, dataset curation, VLA fine-tuning.
- **Cost position** — Teleoperation operators in India command \$22–\$55/hour versus \$65–\$120/hour US — 3–5× cost advantage in the data collection layer of the stack.

Challenges

- **Domestic hardware absence** — India imports the majority of industrial robots from Japan, Germany, and South Korea. No domestic hardware champion at the scale of FANUC, ABB, or Unitree.
- **Infrastructure variability** — Electrical reliability, logistics, and factory conditions vary significantly by state. Robotics deployments often require infrastructure investments beyond the robot itself.
- **Skills pipeline gap** — Robotics-specific vocational training underdeveloped. NASSCOM flags specialized training as a pressing need — operators, maintenance technicians, integrators.
- **Low robot density** — 12 robots per 10,000 employees lags South Korea (415), Japan (397), Germany (415). Absolute scale is growing but penetration remains far behind industrial peers.

CHAPTER 05

Capital & Investment

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

Indian robotics raised ~**\$780M across 95 rounds in 2025**, led by Addverb's funding and GreyOrange follow-ons. Reliance, Tata, and Mahindra have emerged as strategic corporate investors. Indian VC firms (Chiratae, Blume, Prime Venture) have built robotics theses; US-based Sequoia India (Peak XV) and Accel India lead larger rounds. Government co-investment via SIDBI and state innovation funds provides non-dilutive tail capital.

The Data Moat Thesis in India Context

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

01 · Addverb humanoid launch

First Indian humanoid robot for 2025–2026 production marks symbolic entry into the embodied-AI race. Technical success less important than domestic-champion narrative.

02 · Foxconn iPhone scale-up

Sriperumbudur iPhone 17/18 production expansion will drive precision robotics demand. Expect 3,000+ incremental industrial arm installations over 2026–2027.

03 · Data collection arbitrage

As global VLA training demand grows, India's teleoperation operator market is positioned to capture 25–35% of offshore data collection — mirroring the software services arc of 2000s.

04 · Indigenous robot policy

Expect a Make-in-India robot certification scheme and a robotics-specific PLI tranche in FY2027 budget. Political will is firming around domestic hardware capacity.

RCSV PERSPECTIVE ON INDIA

India'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.