Humanoid Robot Webinar

Robotics opportunities, from the US to China and Korea

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Humanoid Robots: Industry Landscape and Market Potential

Industry Overview

- The global humanoid robot industry is at an **inflection point**, poised for **exponential growth** and broad-based disruption across both industrial and consumer sectors.
- The **market size** is projected to rival smartphones and electric vehicles, driven by advances in **AI, robotics technology**, and demographic shifts.

Key Statistics

5B units	600k~1MM units
TAM	By 2030

KEY PLAYERS

1	Tesla	**Industry leader** in humanoid robots.
2	Xiaopeng	**Automotive and AI-driven innovation.**
3	UBTech	**Scalable commercialization, deep R&D.**
4	Unitree	**Agile, cost-effective robotics.**
5	Agibot	**Industrial automation focus.**

Industry trends

Embodied AI & Robotics

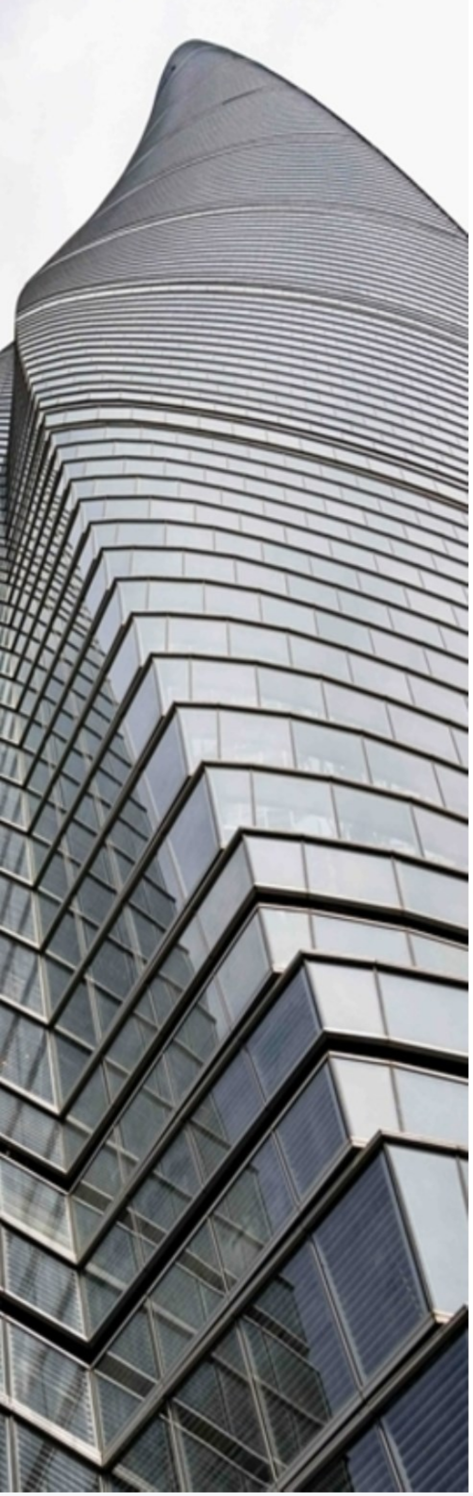
- Advances in **embodied artificial intelligence** and robotics technology are enabling new levels of dexterity, autonomy, and adaptability.

China Demographic Shift

- China's **demographic shift** is driving automation and large-scale humanoid robot adoption.

Policy & Supply Chain

- **Policy support** and supply chain enable rapid commercialization and deployment.



UBTech Robotics: Competitive Edge and Financials

UBTech Robotics

Company Overview

- UBTech is currently the only **HK/China-listed humanoid robot OEM** with scalable commercialization, holding the largest order value in China's sector at **Rmb1.5B** as of Dec 2025.

Key Statistics

Year founded 2012	**HQ** Shenzhen	**Headcount** 2,191
CEO Zhou Jian	**Revenue** Rmb821MM from humanoid	**Partner** BYD, Foxconn, Dongfeng Liuzhou Motor, TI

Products and services

Walker Humanoid Robot

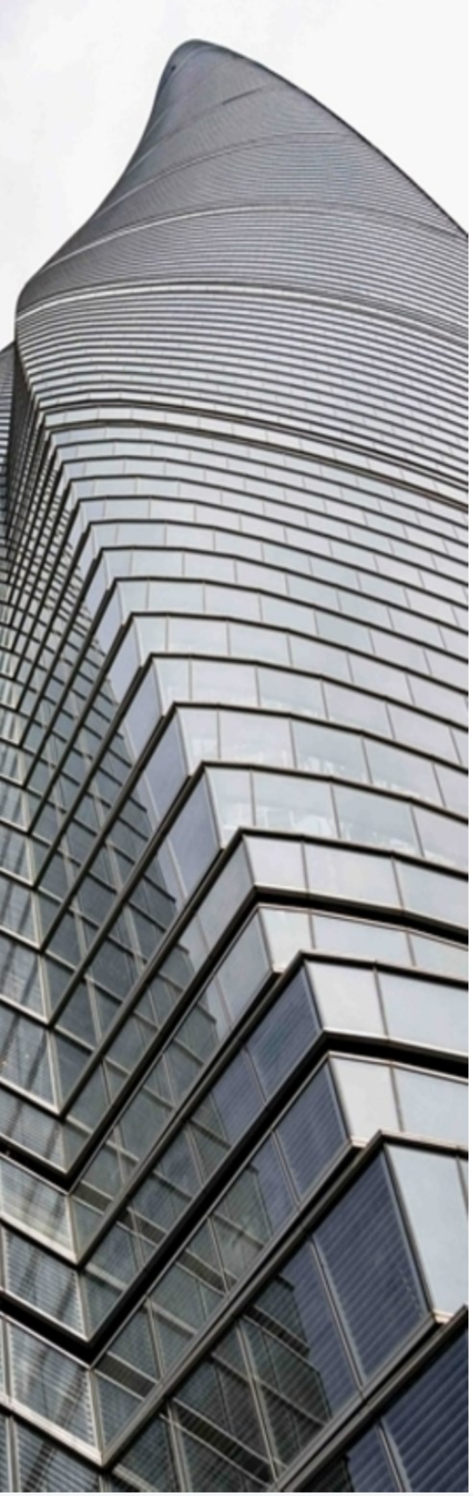
- Walker series, launched in **2018**, established UBTech's early mover advantage and deep industrial ties.

Patents & R&D

- **2,680+ patents** worldwide cover robotics hardware, advanced software, and proprietary operating systems.

Integrated R&D Model

- **Vertically integrated R&D** enables rapid commercialization and tailored industrial robotics solutions.



UBTech Robotics: Robust humanoid robot order and guidance lift

UBTech Robotics

	2025E		2026E		2027E	
Guidance in units	**shipment**	**capacity**	**shipment**	**capacity**	**shipment**	**capacity**
Guidance in 2025	>500	1k	2-3k	5-10k	10k	NA
Guidance in 2026	1,079 (Actual)	>6k Annualized	5-10k	>10k	NA	NA

Humanoid robot order tracker

Order tracker	Date	Size in Rmb MM	Application	Unit terms
Dongfeng Liuzhou Motor	late April	45	factory	c20units
MiEE	Jul-25	90	factory	c100 units
Famous domestic enterprise	Sep-25	250	commercial	unknown
Miracle Logistics Automation	Sep-25	30	factory	c50 units
domestic auto parts company	Oct-25	32	factory	c50 units
Guangxi data collection and testing center equipment procurement project	Oct-25	126	data collection	unknown
Zigong data collection and testing center equipment procurement project	Nov-25	159	data collection	unknown
Fangchenggang data collection and testing center equipment procurement project	Nov-25	264	data collection & secruity	unknown
Jiujiang data collection and testing	Nov-25	143	data collection	unknown
AI model	Dec-25	50	R&D	unknown
Huizhou data collection and testing	Dec-25	60	data collection	unknown
Huhehaote data collection and testing	Dec-25	78	data collection	unknown
Total estimate		1487		

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