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S. Korea Technology | Asia Pacific

LG Group – NVIDIA Collaboration Puts Physical AI in Focus

What's new? According to an article in [Business Korea](#), LG Group is making a broader push into physical AI through collaboration with Nvidia (covered by Joseph Moore), including reported plans to unveil a bipedal humanoid robot in 1Q27 based on [Nvidia's Isaac GROOT](#). The article points to a group-wide approach combining LGE's actuators and robotics capabilities, LG Innotek's sensing technologies and LG Energy Solution's batteries, alongside Nvidia's AI and computing platforms. LGE's CLOiD is also expected to undergo factory validation at its Tennessee production site.

Reaffirms our positive view on LG's robotics opportunity: While LGE has not separately confirmed the reported humanoid roadmap, we believe the media coverage reinforces the thesis from [our recent robotics report](#). Importantly, the opportunity extends beyond LGE – LG Group could combine robotics hardware, components, batteries, manufacturing sites and real-world data within one ecosystem, providing a differentiated platform for physical AI development. For LGE specifically, its actuator/motor expertise and role as a potential system integrator could position it as a key beneficiary, in our view, as LG moves from factory PoCs (Proof of Concept) toward broader robotics commercialization.

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