

INTELLIGENCE BRIEFING

The State of Robotics

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HUMANOIDS

EMBODIED AI & FOUNDATION MODELS

INDUSTRIAL, LOGISTICS & SERVICE

AUTONOMOUS VEHICLES

FUNDING & DEALS

POLICY, LABOR & SUPPLY CHAIN

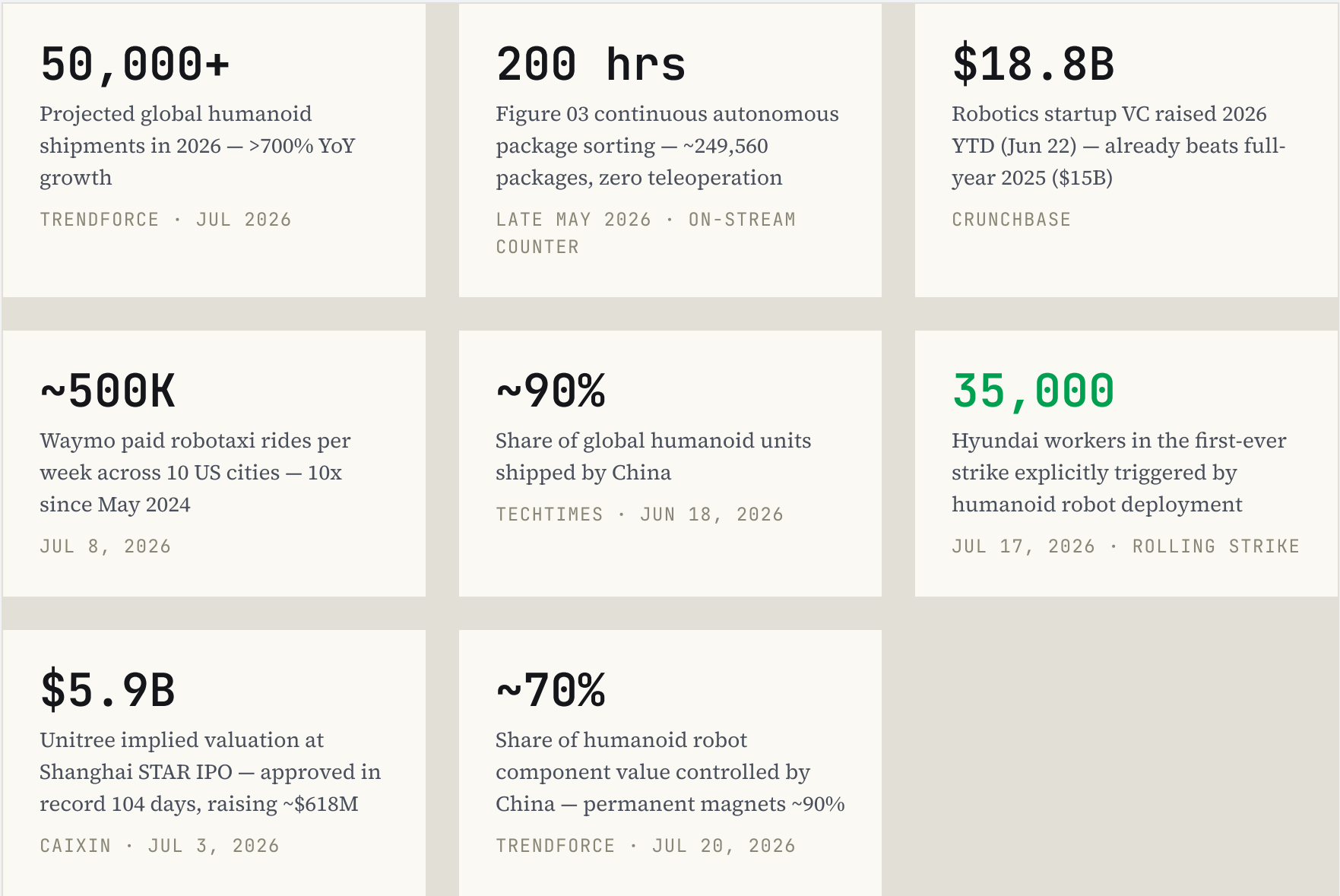


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Executive Overview

The quarter robotics stopped being a demo category. Humanoids entered real factories, the first robot-triggered strike hit a major automaker, and capital records fell.



1. Three Figure 03 robots on Helix-02 sorted packages for 200 hours straight^[1] — ~249,560 packages, zero teleoperation, self-managed charging — the endurance benchmark that turned humanoid autonomy from demo to shift work.
2. Unitree won approval for its Shanghai STAR IPO in a record 104 days^[2] — ~\$618M raise at ~\$5.9B implied, on ¥600M (\$90M) 2025 adjusted net profit (+674% YoY), the first profitable humanoid maker.
3. Hyundai committed 25,000+ Boston Dynamics Atlas robots to its own factories^[3] (May 22) — and by July 17, ~35,000 Hyundai workers launched the first-ever strike explicitly triggered by humanoid deployment^[4], halting roughly half of global output.
4. Robotics startups raised \$18.8B in 2026 by June 22^[5] — already past full-year 2025 (\$15B) and the 2021 record (\$14.1B), led by Saronic (\$1.75B), NEURA (up to \$1.4B), and Skild (\$1.4B at \$15B).
5. Waymo reached ~500,000 paid rides/week across 10 US cities^[6], 10x its May 2024 volume, while Tesla's Optimus production count sits at zero^[7] heading into Q2 earnings against a 50,000–100,000-unit 2026 target.
6. China consolidated its lead: ~90% of global humanoid units shipped and the top embodied-AI benchmarks^[8], ~70% of humanoid component value^[9], and ~\$300B in Five-Year-Plan AI+robotics subsidies^[10].
7. Agility Robotics is going public via SPAC at ~\$2.5B (ticker AGLT)^[11] with \$300M+ in Digit v5 orders and 65,000+ operating hours across 9 customer facilities — while Chinese humanoid startups rush to IPO behind Unitree^[12].
8. Washington opened the policy front: the Section 232 robotics-import tariff window is open now^[13] (Commerce report was due May 30; no decision as of Jul 20), alongside the GUARD Act^[14] and a federal procurement ban bill for covered foreign UGVs^[15].
9. The supply chain tightened: MOFCOM entity-listed MP Materials and USA Rare Earth^[16] (Jun 22), NdPr hit a 2026 high of ~\$133/kg^[17], and China's suspension of expanded rare-earth controls expires Nov 10.
10. The safety ledger opened too: a Unitree G1 kicked a child at a demo^[18], Waymo recalled ~3,900 robotaxis^[19], and the first humanoid-specific safety standard is still a working draft^[20] while 50K+ units ship.

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Humanoids

The gap between shipped and promised is the story. China ships ~90% of units; American programs lead on endurance proofs and capital — and on unmet targets.

Scoreboard: shipped vs. committed

Verified deployments against stated commitments, as of July 20, 2026.

COMPANY	PLATFORM	SHIPPED / DEPLOYED	COMMITTED / TARGETED	EVIDENCE
UNITREE	G1 / H-series	~5,500 (2025)	10,000–20,000 in 2026	Caixin ^[1]
AGIBOT	G2 (wheeled) + humanoids	5,100+ (2025, 39% share)	15,000th robot produced Jun 2026	Robot Report / Omdia ^[2]
FIGURE AI	Figure 03 / Helix-02	~150 (2025); ~60 Feb → ~240 Apr/mo	100,000 in 4 yrs (Adcock)	Forbes ^[3]
BOSTON DYNAMICS	Atlas	2026 output fully committed	25,000+ to Hyundai plants; 30,000/yr US factory planned	TechTimes ^[4] · A3 ^[5]
AGILITY	Digit v5	65,000+ op hours, 9 facilities	\$300M+ order book	SEC filing ^[6]
TESLA	Optimus (Gen 3)	0 produced (as of Jul 20)	50,000–100,000 in 2026 (Musk)	TechTimes ^[7]
1X	NEO	0 verified deliveries	10,000 pre-orders in 5 days; ship by end-2026	GlobeNewswire ^[8]

COMPANY	PLATFORM	SHIPPED / DEPLOYED	COMMITTED / TARGETED	EVIDENCE
APPTRONIK	Apollo 2	Mercedes-Benz, GX0 network	~90,000 sq ft “Robot Park” opened Jun 30	GlobeNewswire^[9]

Smaller entrants are shipping too: Japan Airlines and GMO deployed two Unitree-based humanoids at [Haneda Airport baggage operations](#) at ~\$15,400/unit^[10] (May), and Faraday Future’s robotics arm reported [220+ units shipped in H1](#)^[11].

Endurance runs: autonomy leaves the demo reel

The metric that matters shifted from “can it walk” to “how many unattended hours.”

OPERATOR	SITE / TASK	RUN	THROUGHPUT	SOURCE
Figure 03 ×3 (Helix-02)	Package sorting	200 hrs continuous, zero teleop	~249,560 packages*	Sherwood^[12]
Figure 02 (retired)	BMW Spartanburg, 10-month pilot	10-hr daily shifts	90,000+ components, 30,000+ X3s	AI Insider^[13]
AgiBot G2 fleet	Longcheer Nanchang, tablet QC line	140+ cumulative hrs, <4% downtime	~310 units/hr; scaling to 100 robots by Q3	PR Newswire^[14]
Agility Digit	GXO, Schaeffler, Toyota Canada, Mercado Libre	65,000+ operating hours	9 customer facilities	SEC filing^[6]

*One secondary report cited ~149K packages; we use the on-stream counter figure of 249,560, which is multiply corroborated. Helix-02’s progression ran 8-hour shifts (May 14) → 24 hours nonstop → 200 hours^[15], all on onboard-only inference — the [Helix 02 model^{\[16\]}](#) runs a 1kHz System 0 and 200Hz System 1, trained on 1,000+ hours of human motion data across 200K parallel sim environments, with 3-gram tactile sensitivity.

BMW: pilot to production

BMW retired Figure 02 after its 10-month Spartanburg pilot and moved [Figure 03 into logistics work at the plant^{\[13\]}](#) (Jun 26). A separate [Leipzig pilot this summer uses Hexagon’s AEON^{\[17\]}](#) — not Figure, despite widespread aggregator conflation. Figure itself sits at a [\\$39B post-money valuation^{\[18\]}](#) (Series C, Sep 2025), though [Forge secondary pricing](#)

implied ~\$34.2B in May^[19]; the company has warned that unauthorized pre-IPO share sales are void amid fraud schemes.

The promise gap

Two of the most-watched Western consumer/factory programs enter H2 with zero verified output: Tesla Optimus production is effectively zero^[7] (V3 reveal targeted late July–early August on the freed Fremont Model S/X line; ~10,000 unique parts; Musk calls the ramp “literally impossible to predict”), and 1X’s NEO has zero verified customer deliveries^[8] against 10,000 pre-orders at \$20,000 (or \$499/mo). Each Optimus also needs ~3.5kg of rare-earth magnets across 40+ servos — China export licensing is the binding constraint.

WAIC Shanghai: the volume story

WAIC opened July 18 with 300+ product debuts^[20], humanoids the headline category. China’s 2026 humanoid output is projected to exceed 100,000 units, and TrendForce projects global shipments above 50,000 units for the year, up >700% YoY^[21].

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Embodied AI & Foundation Models

The software stack consolidated around a handful of foundation models and one chip vendor — while China took the benchmark lead.

Genie Operator-2 (GO-2)

APR 9

AgiBot

Embodied foundation model claiming SOTA across robotics benchmarks; shipped alongside the Genie Envisioner 2.0 world simulator. [Robot Report](#)^[1]

Gemini Robotics-ER 1.6

APR 15

Google DeepMind

Embodied-reasoning update; the Gemini Robotics line also ingests training data from Apptronik's Robot Park network. [Google](#)^[2]

π -0.5 / π -0.7

APR 22

Physical Intelligence

Claimed first robotics FM to generalize across embodiments without per-robot fine-tuning; π -0.7 adds steerability. Hardware-free, \$400M raised, \$2.8B valuation. [PI blog](#)^[3]

GR00T N1.7

APR 2026

NVIDIA

3B model on a Cosmos-Reason2-2B backbone, trained on ~20K hours of EgoScale human video; in early access. [NVIDIA](#)^[4]

GR00T N2 (preview)

MAR 16 6TC

NVIDIA

World-action model from DreamZero; >2x success on new tasks/environments vs leading VLAs; #1 on MolmoSpaces and RoboArena; GA end-2026. Alongside Cosmos 3, Isaac Lab 3.0, Newton physics 1.0. [NVIDIA](#)^[4]

Isaac GR00T Reference Humanoid

JUN 1

NVIDIA

First open humanoid reference design, built on Jetson Thor; hardware from Unitree expected late 2026. [NVIDIA](#)^[5]

Jetson T3000 / T2000 (Thor)

JUL 16

NVIDIA

T3000 delivers 865 FP4 TFLOPS at half the size/power of the \$2,999 T5000. 2M+ developers on the NVIDIA robotics stack; adopters include Agility, Amazon Robotics, Boston Dynamics, Figure, Caterpillar, Medtronic, Meta. [NVIDIA](#)^[6]

Rho-alpha VLA

JAN 21

Microsoft Research

Phi-derived vision-language-action model adding a tactile modality — context for the quarter: every major lab now fields an embodied model. [Microsoft](#)^[7]

China leads the benchmarks, not just the shipments

Per [June reporting](#)^[8], China now both ships ~90% of global humanoid units and leads embodied-AI benchmarks. The counterweight is capital: [Skild AI's \\$1.4B Series C at \\$15B](#)^[9] (Jan, SoftBank) remains the largest robotics-AI software round on record.

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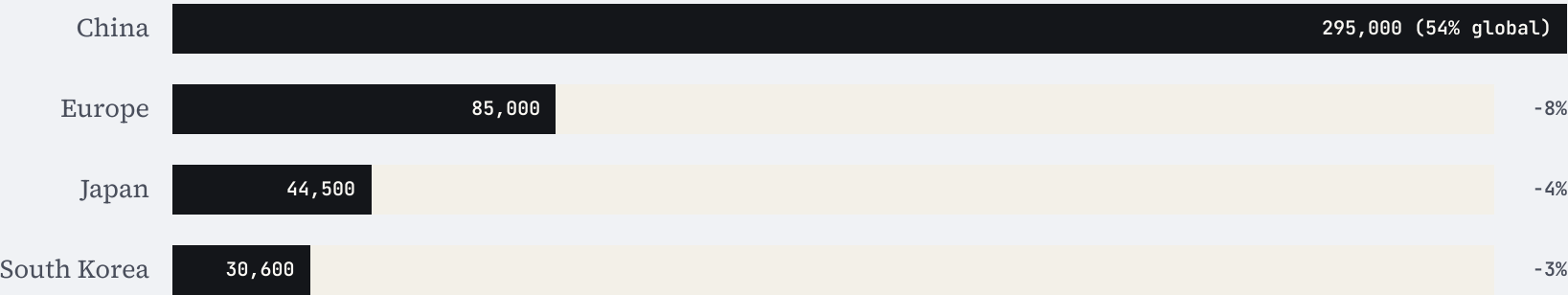
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Industrial, Logistics & Service

The unglamorous installed base keeps compounding: 4.66M industrial robots in operation, a million of them Amazon’s, and delivery robots quietly crossing eight-figure milestones.

Industrial installations (IFR World Robotics 2025, 2024 actuals)

542,000 industrial robots installed in 2024 — the fourth straight year above 500K and double the level of a decade ago. Operational stock: 4,664,000 (+9%). [IFR](#)^[1]



Regional split: Asia 74%, Europe 16%, Americas 9%. Chinese domestic vendors now hold 57% of their home market. On the service side, [professional service robot sales hit ~200,000 units in 2024 \(+9%\)](#)^[2], with transport/logistics AMRs the largest class at 102,900 (+14%) and RaaS fleets up 31%.

Warehouse: Amazon’s million-robot fleet

Amazon deployed its 1,000,000th warehouse robot (Jul 1, 2025); its DeepFleet gen-AI coordination model cuts fleet travel time 10%, and [75% of global Amazon deliveries are now robot-assisted](#)^[3]. In June it unveiled a [next-gen Proteus AMR taking natural-language instructions](#), part of a €10B+ EU investment^[4], with STARK tote-picking heading to 15 EU sites by 2027. **Symbotic** reported 70 systems in deployment and a contracted backlog of [\\$22.7B per its fiscal Q2 reporting](#)^[5] (as reported), and [acquired ARMS Innovations \(Jul 2\)](#)^[6]. In cobots, **Universal Robots** launched the UR AI Trainer (with Scale AI) and the UR18; UR holds ~15% of a cobot market [estimated at \\$2.8B for 2026 \(21.4% CAGR\)](#)^[7].

Delivery & field milestones

OPERATOR	MILESTONE	SCALE	DATE	SOURCE
Starship	10M autonomous deliveries	3,000+ robots, 300+ locations, 8 countries; \$3-4 cheaper than rider-based	Apr 27	Starship ^[8]
Serve Robotics	Largest US sidewalk fleet	~2,000 robots, ~20 cities; 40 LA neighborhoods; fleet 11x since 2024; \$26M 2026 revenue target	May 22	Spectrum ^[9]
Walmart	1M drone deliveries	40% in fiscal Q1 FY27 alone; 66 stores, 5 metros, avg 23 min	May 29	Walmart ^[10]
Zipline	2.5M+ deliveries	Austin + Cleveland Clinic home delivery; 13x H1 merchant growth; US volume +~15% w/w for 7 months; \$800M total Series H	Jul 13	DroneLife ^[11] · Robot Report ^[12]
Intuitive Surgical	Q2 2026 results	da Vinci procedures +~15% YoY; 468 systems placed (246 da Vinci 5); installed base 11,710 (+12%)	Jul 17	SEC 8-K ^[13]
J&J	Ottava submitted to FDA (de novo)	FORTE pivotal: all 30 robotic gastric bypasses completed, zero conversions	Jan 5-7	MedTech Dive ^[14]

OPERATOR	MILESTONE	SCALE	DATE	SOURCE
John Deere	Autonomous 8R nationwide launch prep	Field-testing in 18 states; tractor + kit >\$500K	2026	<u>Tractor Evolution</u> ^[15]
US Air Force	First CCA production contracts	Anduril FQ-44 + General Atomics FQ-42; 150 drone wingmen by 2030	Jun 17	<u>Defense One</u> ^[16]

Defense autonomy is scaling on its own curve: beyond the CCA award, Anduril unveiled the “Thunder” autonomous tiltrotor and holds a \$20B Army counter-drone award^[17] (Mar 14).

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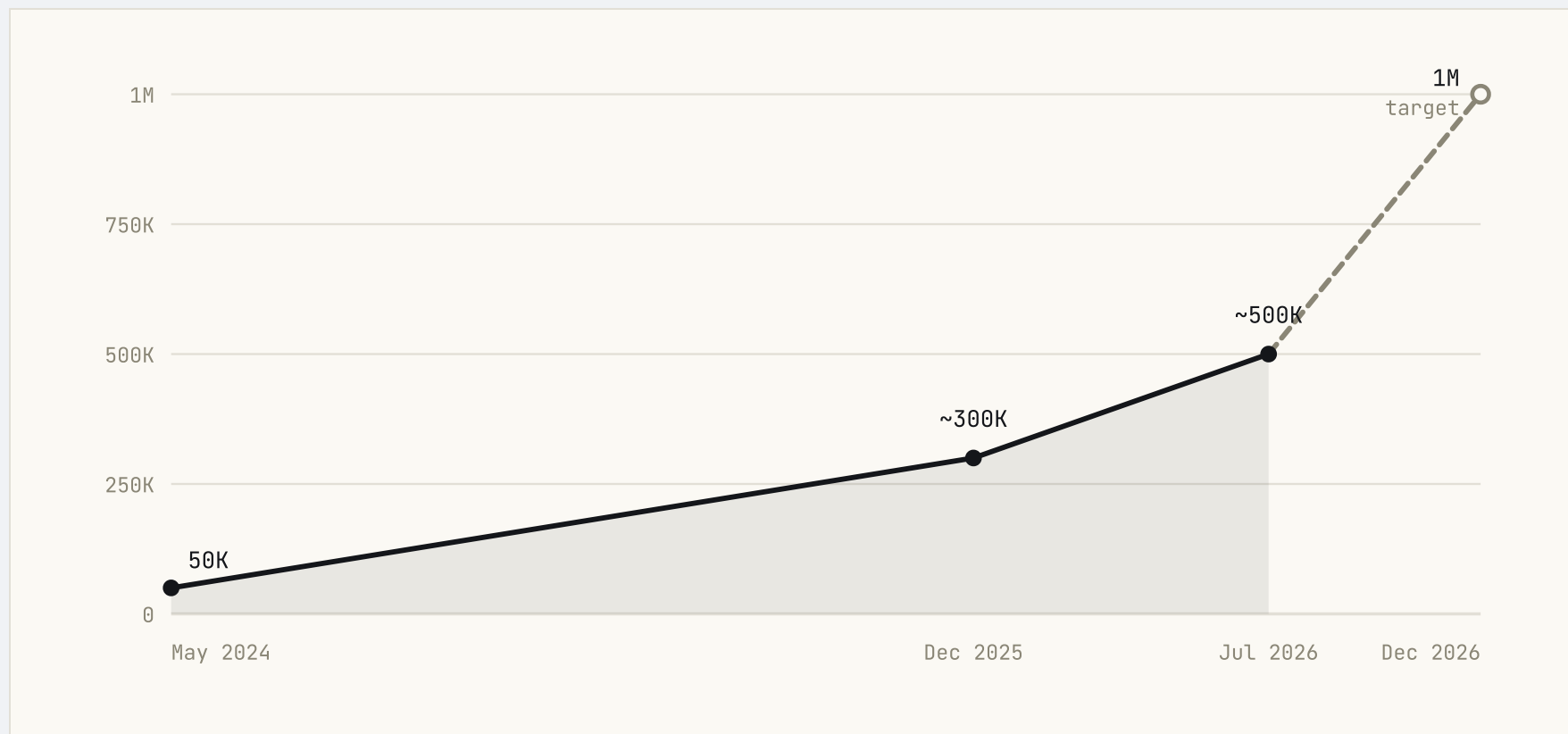
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Autonomous Vehicles

Robotaxis crossed from pilot to utility on two continents. Trucking logged its first economics-grade proofs.

Waymo Weekly Rides – The Robotaxi S-Curve

Paid rides per week, May 2024 → July 2026, with the company's end-2026 target as a dashed segment.



Sources: [Road to Autonomy](#)^[1] · [Electrek](#)^[2] · target per [Waymo \(Mawakana, Dec 2025\)](#)^[3].

Waymo is live in 10 US cities including Las Vegas, with Denver, San Diego, and Tampa next and groundwork in 20+ cities including Tokyo and London.

Robotaxi operator scoreboard

OPERATOR	SCALE	FOOTPRINT	TRAJECTORY	SOURCE
WAYMO	~500K paid rides/wk	10 US cities	Target 1M/wk by end-2026	Electrek ^[2]
BAIDU APOLLO GO	3.2M fully driverless rides Q1 (+120% YoY); 22M+ cumulative	27 cities; Dubai commercial; Swiss L4 permit	300K weekly rides at Q4-2025 peak	Baidu IR ^[4] · CnEVPost ^[5]
TESLA	~20 vehicles active in Austin (~39 fleet-wide, per community tracking)	Austin metro (~245 sq mi); Dallas/Houston Apr; Miami Jul	Musk: 2M robotaxis “in a year”	Electrek ^[6]
PONY.AI	Q1 robotaxi revenue +395% YoY	1,700 vehicles Q1	2026 fleet target raised 3,000 → 3,500+; 100K by 2030	KrASIA ^[7]
WERIDE	Revenue +144% YoY; fleet 1,023 (Jan)	Licensed in 8 countries; Singapore GXR with Grab (Apr 1)	2,600+ vehicles end-2026; 1,200 robotaxis with Uber in Middle East by 2027	WeRide IR ^[8]

Autonomous trucking

Aurora crossed 250,000 driverless miles with zero attributed collisions^[9] across 10 routes — including a ~1,000-mile Fort Worth–Phoenix run driven 15 hours nonstop, beyond human hours-of-service limits — targeting 200 trucks and an \$80M revenue run-rate by end-2026. **Waabi** and Volvo claimed an industry first: a virtual driver generalizing to a new truck platform with zero additional training^[10]; Waabi raised \$1B (Jan 28) and plans 25,000 robotaxis on Uber^[11]. **Kodiak** doubled its driverless fleet to 20 trucks^[12] (Atlas Energy), ran the first triple-trailer autonomous haul, and logged 10,700+ paid driverless hours (+106% QoQ).

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Funding & Deals

A record year with five months to spare — and the first real public-market exits for humanoid makers.

\$18.8B and counting

Robotics startups raised \$18.8B in 2026 through June 22 (Crunchbase)^[1] — ahead of full-year 2025 (\$15B) and the prior record of \$14.1B (2021). Dealroom counts \$55.8B on broader definitions; we use the Crunchbase figure. Q1 alone: \$3.3B into Chinese robotics startups across 126 deals, and \$6.4B+ into physical-AI startups globally across 27 deals^[2].

Top private rounds, 2026 YTD

#	COMPANY	ROUND	AMOUNT	VALUATION	WHEN / LEAD
1	Saronic	Series D	\$1.75B	—	Mar · Kleiner Perkins
2	NEURA Robotics	Series C	up to \$1.4B (milestone-contingent)	~\$7B	Jun 10 · Tether; Qualcomm, Amazon, Nvidia, Bosch, EIB — <u>largest-ever full-stack robotics round</u> ^[3]
3	Skild AI	Series C	\$1.4B	\$15B	Jan · SoftBank
4	Shihang Intelligent	Series A	\$1B	—	Jun 15 · among largest robotics Series A ever
5	Mind Robotics	Series A + follow-on	\$500M + \$400M	—	Mar + May

#	COMPANY	ROUND	AMOUNT	VALUATION	WHEN / LEAD
6	Apptronik	Series A ext.	\$520M (total A >\$935M)	\$5.5B	Feb
7	Galbot	—	\$362M	—	Mar · China Big Fund, Sinopec, CITIC
8	General Intuition	Series A	\$320M	—	Jun
9	Standard Bots	Series C	\$200M	\$1B	Jun

Sources: [Crunchbase](#)^[1] · [The Robot Report](#)^[4]. Zipline’s \$800M total Series H (Mar) sits alongside these as the largest drone-delivery raise.

Public markets open for humanoids

Unitree — STAR IPO

APPROVED

CSRC approval in a record 104 days (Jul 3). Raising ¥4.2B (~\$618M) at ~\$5.9B implied; debut possible late July. First profitable humanoid maker: ¥600M (\$90M) 2025 adjusted net profit, +674% YoY.

> [Caixin](#)^[5] · [Rest of World](#)^[6]

Agility — SPAC (AGLT)

ANNOUNCED

Merging with Churchill Capital Corp XI at ~\$2.5B (Jul 7–14); >\$620M gross proceeds including a ~\$200M PIPE led by Foxconn. \$300M+ Digit v5 order book.

> [R&AN](#)^[7] · [SEC](#)^[8]

China IPO queue

FORMING

“Listing is a must”: EngineAI has filed confidentially in Hong Kong; AgiBot is planning an HK IPO. Expect the Unitree debut to set the comp.

> [CNBC](#)^[9]

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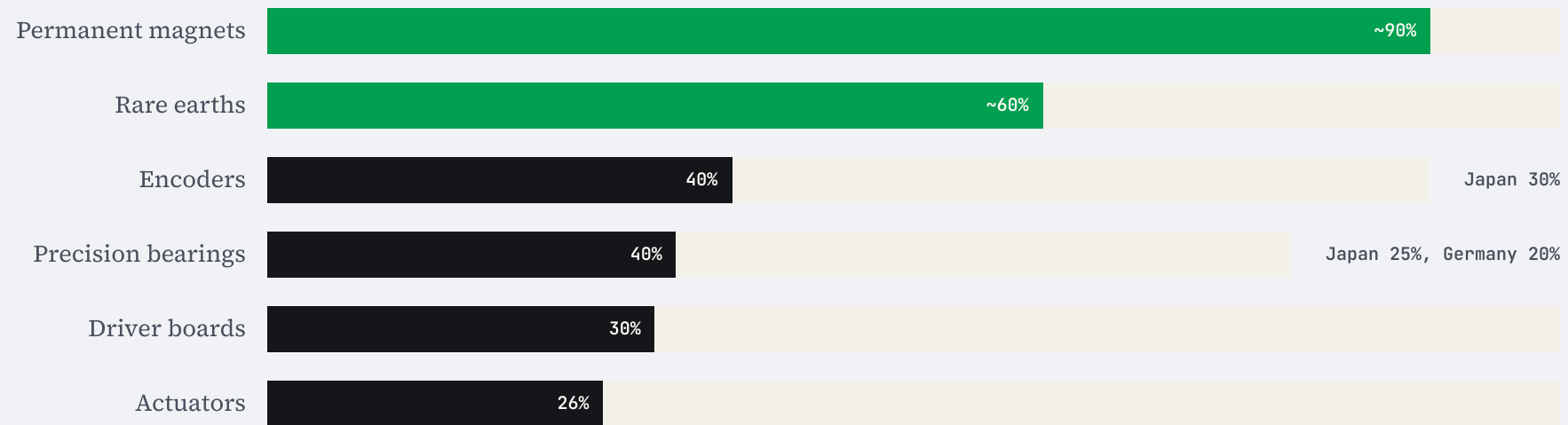
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Policy, Labor & Supply Chain

The bottleneck isn't intelligence — it's magnets, tariffs, and labor politics.

China's grip on the humanoid component stack

Share of component value controlled by China — [TrendForce, Jul 20, 2026^{\[1\]}](#). Overall: ~70% of humanoid component value.



An estimated ~70% of Optimus Gen-3 component value comes from Chinese suppliers^[2]; Sanhua and Tuopu are building actuator plants in Nuevo León, Mexico, and Leaderdrive has broken Japan's harmonic-reducer monopoly at ~40% lower cost. Harmonic drives remain the clearest hardware bottleneck (Harmonic Drive, Nabtesco, Leaderdrive; raw materials +15–20%). The component opportunity is sized at \$58.9B starting with actuators, sensors, and batteries (DataM)^[3].

Washington vs. Beijing

Section 232 tariffs

WINDOW OPEN

Commerce's robotics/machinery import report was due May 30; the President's 90-day decision window is open with no decision as of Jul 20. NAM, A3, and the Business Roundtable warn tariffs would slow reshoring.

› [White & Case^{\[4\]}](#) · [Robot Report^{\[5\]}](#)

Congressional bills

IN COMMITTEE

The GUARD Act (Jun 4) would extend the FCC Covered List to Chinese-linked robotics comms; the National Commission on Robotics Act (Senate + H.R. 7334) and the American Security Robotics Act (H.R. 8189, federal procurement ban on covered foreign UGVs) round out the docket.

› [DroneLife^{\[6\]}](#) · [Congress.gov^{\[7\]}](#)

China's industrial policy

EXECUTING

The 15th Five-Year Plan directs ~\$300B of AI+robotics subsidies; MIIT targets 100,000 humanoids deployed by 2027 and mandates 10,000 in commercial use by end-2026. HEIS 2026 is the world's first national humanoid standard system.

› [The Diplomat^{\[8\]}](#) · [Robot Today^{\[9\]}](#)

Rare-earth escalation

CLIFF: NOV 10

MOFCOM entity-listed MP Materials and USA Rare Earth (Jun 22) — precisely the firms building the non-China supply chain. NdPr hit a 2026 high of ~\$133/kg (Jul 1). China's suspension of its expanded Oct-2025 rare-earth controls expires Nov 10, 2026.

› [Oregon Group^{\[10\]}](#) · [Mainrich^{\[11\]}](#)

Labor draws its first line

July 17: the first strike in history explicitly triggered by humanoid robot deployment. Roughly 35,000 Hyundai workers began a rolling strike^[12] affecting about half of global output, demanding a worker veto over humanoid deployment — weeks after Hyundai committed 25,000+ Atlas robots to its own plants and its Korean union blocked deployment without a labor deal^[13]. In the US, the UAW erupted after GM idled 1,000+ Detroit workers while installing 50 robots^[14] (Jun 25). And leaked Amazon planning documents — disputed by the company — reportedly describe automating 75% of operations, avoiding 160K+ US hires by 2027 and up to 600K roles by 2033^[15], with guidance to say “cobot” rather than “AI.”

No binding safety standard while 50K+ humanoids ship

ISO 10218:2025 and R15.06-2025 are in force for industrial robots, but the first humanoid-specific standard, ISO 25785-1, is still a working draft (2026–27)^[16]. The regulatory instrument does not yet exist for the product category shipping fastest.

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Incidents & Risk Board

The incident ledger for the coverage window. Vol. 1 sets the baseline; the count gets tracked from here.

2026-02-04	Amazon Prime Air MK30 crashes into apartment building PROPERTY Richardson, TX; NTSB/FAA also probing a separate crane strike. sUAS News ^[1]
2026-04-24	Robot grabs student dancer in Xi'an INJURY RISK Attributed to signal interference. OECD AI incident registry ^[2]
2026-06-01	Unitree G1 kicks a child at martial-arts demo INJURY Urumqi; crowd-control failure, viral footage. The clearest public demonstration yet that demo-grade crowd safety is unsolved. Interesting Engineering ^[3]
2026-06 (advanced)	NHTSA advances ~3.2M-vehicle Tesla probe to engineering analysis FATALITY Last step before a recall demand; includes a Jun 19 fatality in Katy, TX (Model 3 allegedly in automated mode). HNGN ^[4]
2026-06-18	Waymo recalls ~3,900 robotaxis RECALL Sixth recall in ~2 years, after 13 incidents entering freeway construction zones at speed. TechCrunch ^[5]
2026 (Jan / Mar)	Sidewalk-robot mishap file PROPERTY A Coco delivery robot destroyed by a train on Miami tracks (Jan 15); two sidewalk robots hit Chicago bus shelters within 48 hours (Mar). PopSci ^[6]

0

Binding humanoid-specific safety standards in force

ISO 25785-1 STILL WORKING DRAFT

Nov 10

Expiry of China's suspension of expanded rare-earth export controls

NDPR ALREADY AT ~\$133/KG 2026 HIGH

90-day

Section 232 tariff decision window open on robotics imports

REPORT WAS DUE 2026-05-30

600K

US roles Amazon could avoid or displace by 2033, per leaked plans (disputed)

REPORTED; AMAZON DISPUTES

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Sector Timeline

The running milestone history of the sector — the regime changes, firsts, and records a future reader needs to understand the arc. Extended every issue; Vol. 1 seeds it with the founding quarter.

- 2026-05-14

■

Figure 03 proves humanoid shift work FIRST

Three Figure 03 robots on Helix-02 complete full 8-hour autonomous shifts, then run 200 hours straight by late May — ~249,560 packages sorted, zero teleoperation, self-managed charging. [Sherwood](#)^[1]
- 2026-05-22

■

Hyundai commits 25,000+ Atlas robots RECORD

The largest humanoid commitment to date: 25,000+ Boston Dynamics Atlas units for Hyundai’s own factories, plus a planned 30,000/yr US robot factory. [TechTimes](#)^[2]
- 2026-05-29

■

Walmart crosses 1M drone deliveries MILESTONE

40% of them in fiscal Q1 FY27 alone — drone delivery moves from pilot to retail utility across 66 stores in 5 metros. [Walmart](#)^[3]
- 2026-06-01

■

Unitree G1 kicks a child at a public demo INCIDENT

The viral Urumqi crowd-control failure becomes the sector’s reference public-safety incident — with no binding humanoid safety standard yet in force. [Interesting Engineering](#)^[4]
- 2026-06-17

■

USAF awards first CCA production contracts REGIME CHANGE

Anduril FQ-44 and General Atomics FQ-42 become the first production drone wingmen — 150 planned by 2030. Autonomous combat aircraft enter procurement, not just prototyping. [Defense One](#)^[5]
- 2026-06-22

■

MOFCOM entity-lists MP Materials and USA Rare Earth ESCALATION

Beijing targets precisely the firms building the non-China rare-earth supply chain; its suspension of expanded export controls expires Nov 10. The robotics supply chain is now a geopolitical instrument. [Oregon Group](#)^[6]

2026-06-23

AgiBot runs a mass-production QC line FIRST

Livestreamed wheeled G2 fleet operates the full QC section of a tablet mass-production line at Longcheer Nanchang at ~310 units/hr — the first embodied-AI deployment in consumer-electronics mass production. [PR Newswire](#)^[7]

2026-06-26

BMW moves humanoids from pilot to production FIRST

Figure 03 takes over logistics at Plant Spartanburg after the 10-month Figure 02 pilot (90,000+ components); BMW simultaneously announces Germany’s first humanoid production deployment at Leipzig (Hexagon AEON). [BMW Group](#)^[8]

2026-07-03

Unitree wins IPO approval in record 104 days FIRST

The first profitable humanoid maker (¥600M 2025 adjusted net profit, +674% YoY) clears the CSRC for a ~\$618M Shanghai STAR raise at ~\$5.9B implied — the humanoid sector’s first major public listing. [Caixin](#)^[9]

2026-07-07

Agility Robotics announces \$2.5B SPAC (AGLT) FIRST

The first US humanoid maker to go public: >\$620M gross proceeds including a ~\$200M Foxconn-led PIPE, on \$300M+ Digit v5 orders and 65,000+ customer operating hours. [R&AN](#)^[10]

2026-07-08

Waymo hits ~500,000 paid rides/week MILESTONE

10x its May 2024 volume, across 10 US cities with Las Vegas newly live — the halfway mark to its 1M/week end-2026 target. [Electrek](#)^[11]

2026-07-17

First humanoid-triggered strike in history REGIME CHANGE

~35,000 Hyundai workers begin a rolling strike affecting roughly half of global output, demanding a worker veto over humanoid deployment. Labor formally enters the humanoid era. [Forbes](#)^[12]

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Forecasts & Scorecard

The calibration instrument. Falsifiable claims with probabilities and resolve-by dates — ours and the industry’s. Our own Vol. 1 forecasts get graded starting Vol. 2.

Our Forecasts – Vol. 1

Eight predictions a stranger can grade from public data on the resolve date.

SOR-2607-0185% Tesla produces fewer than 5,000 Optimus units in calendar 2026 (vs. Musk’s 50,000–100,000 target). › Resolves by: 2027-01-31 (Q4 earnings / company disclosures) › Basis: <u>production count effectively zero as of Jul 20^[1]</u>; rare-earth licensing bottleneck	SOR-2607-0255% Unitree ships ≥10,000 humanoids in calendar 2026 (the lower bound of its own 10K–20K target). › Resolves by: 2027-03-31 (IPO-era disclosures / annual report) › Basis: <u>~5,500 shipped in 2025; \$618M fresh IPO capital^[2]</u>	SOR-2607-0370% Waymo does NOT reach 1M paid rides/week by Dec 31, 2026 (finishes between 600K and 900K). › Resolves by: 2026-12-31 › Basis: <u>~500K at mid-year; FutureSearch models ~775K as likely^[3]</u>
--	--	--

SOR-2607-04

60%

1X delivers its first paying-customer NEO units before end-2026 — but fewer than 1,000 total.

- › Resolves by: 2026-12-31
- › Basis: Hayward factory at full production, 200+ employees; zero verified deliveries mid-July^[4]

SOR-2607-05

55%

The US announces some Section 232 tariff action on robotics/machinery imports by Sep 30, 2026.

- › Resolves by: 2026-09-30
- › Basis: 90-day presidential window opened off the May 30 report deadline^[5]

SOR-2607-06

75%

Agility's SPAC closes and AGLT trades publicly by Dec 31, 2026.

- › Resolves by: 2026-12-31
- › Basis: deal announced Jul 7 with \$200M Foxconn-led PIPE committed^[6]

SOR-2607-07

80%

At least one more humanoid maker beyond Unitree publicly files for or completes a listing by Jan 31, 2027 (EngineAI, AgiBot, LimX, or peer).

- › Resolves by: 2027-01-31
- › Basis: EngineAI already confidentially filed in HK; AgiBot planning HK IPO^[7]

SOR-2607-08

65%

Global 2026 humanoid shipments land between 35,000 and 70,000 units on TrendForce-consistent definitions.

- › Resolves by: 2027-06-30 (when full-year industry data publishes)
- › Basis: TrendForce projects >50K (+700% YoY)^[8]; China output projected >100K but shipments lag output

Forecast Watch — external

Notable open forecasts we are tracking to resolution.

FORECASTER	MADE	CLAIM	RESOLVES BY	STATUS
Elon Musk / Tesla	2025-26	<u>50,000-100,000 Optimus units in 2026; suppliers told 1,000/wk by Sept</u> ^[1]	end-2026	TRENDING MISS
Elon Musk	2026	<u>Fremont 1M-unit annual Optimus run-rate by end-2026</u> ^[9]	end-2026	TRENDING MISS
Brett Adcock / Figure	2025-01	<u>Ship 100,000 humanoids in 4 years (~2029)</u> ^[10] — ~150 shipped 2025, but monthly deliveries doubling in 2026	~2029	OPEN
Goldman Sachs	2025	<u>Humanoid TAM \$38B / 1.4M units by 2035</u> ^[11]	2035	OPEN
Morgan Stanley	2025-26	<u>~13M humanoids by 2035; ~\$5T market by 2050; China 2026 shipments raised 28K → 50K</u> ^[12]	2035 / end-2026	OPEN
TrendForce	2026-04	<u>China humanoid output +94% in 2026; Unitree + AgiBot ~80% of shipments</u> ^[13]	end-2026	OPEN
Unitree	2026	<u>Ship up to 20,000 humanoids in 2026</u> ^[14]	end-2026	OPEN
Elon Musk	2026-01	<u>Robotaxis reach a quarter to half of the US population by end-2026</u> ^[15] — 5-city launches reported pushed back	end-2026	OPEN

FORECASTER	MADE	CLAIM	RESOLVES BY	STATUS
Elon Musk	2026-01	<u>2M Tesla robotaxis “in a year” — more than Tesla can build</u> ^[16]	2027-01	OPEN
Tekedra Mawakana / Waymo	2025-12	<u>1M paid rides/week by end-2026</u> ^[3] — ~500K at mid-year; FutureSearch models ~775K likely	end-2026	TRENDING MISS

Scorecard — resolved forecasts

Already-graded claims from the record. The overshoot pattern is one-directional so far.

FORECASTER	CLAIM	VERDICT	EVIDENCE
Elon Musk (Jan 2025)	~10,000 Optimus built in 2025, ~1,000 doing productive work	MISS	<u>Several hundred built; Musk admitted zero doing useful work (Jan 2026)</u> ^[17]
Elon Musk (Jul 2025)	Tesla ride-hailing reaches “half the US population” by end-2025	MISS	<u>Austin only at year-end</u> ^[18]
Tesla (Oct 2024)	Optimus mass production in 2025	MISS	<u>No mass production occurred in 2025</u> ^[19]
METR (Mar 2025)	AI task-horizon doubling every ~7 months	PARTIAL	<u>Trend held but accelerated to ~4 months — the forecast undershot reality</u> ^[20]

The asymmetry to watch: company timelines overshoot (every graded Tesla claim missed), while third-party capability trendlines have undershot. Vol. 2 begins grading SOR-2607-01 through -08 against this pattern.

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THE STATE OF ROBOTICS

VOL. 2 — AUGUST 2026

Caixin · [Unitree IPO](#) · [Sherwood](#) · [Figure 200-hr run](#) · [IFR World Robotics 2025](#) · [TrendForce](#) · [US-China divide](#) · [Crunchbase](#) · [Funding](#) · [Electrek](#) · [Waymo](#) · [SEC](#) · [Agility SPAC](#) · [Forbes](#) · [Hyundai strike](#) · [White & Case](#) · [Section 232](#) · [NVIDIA](#) · [Jetson Thor](#) · [Amazon](#) · [1M robots](#)

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