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The Multi-Trillion Dollar Robotics Opportunity

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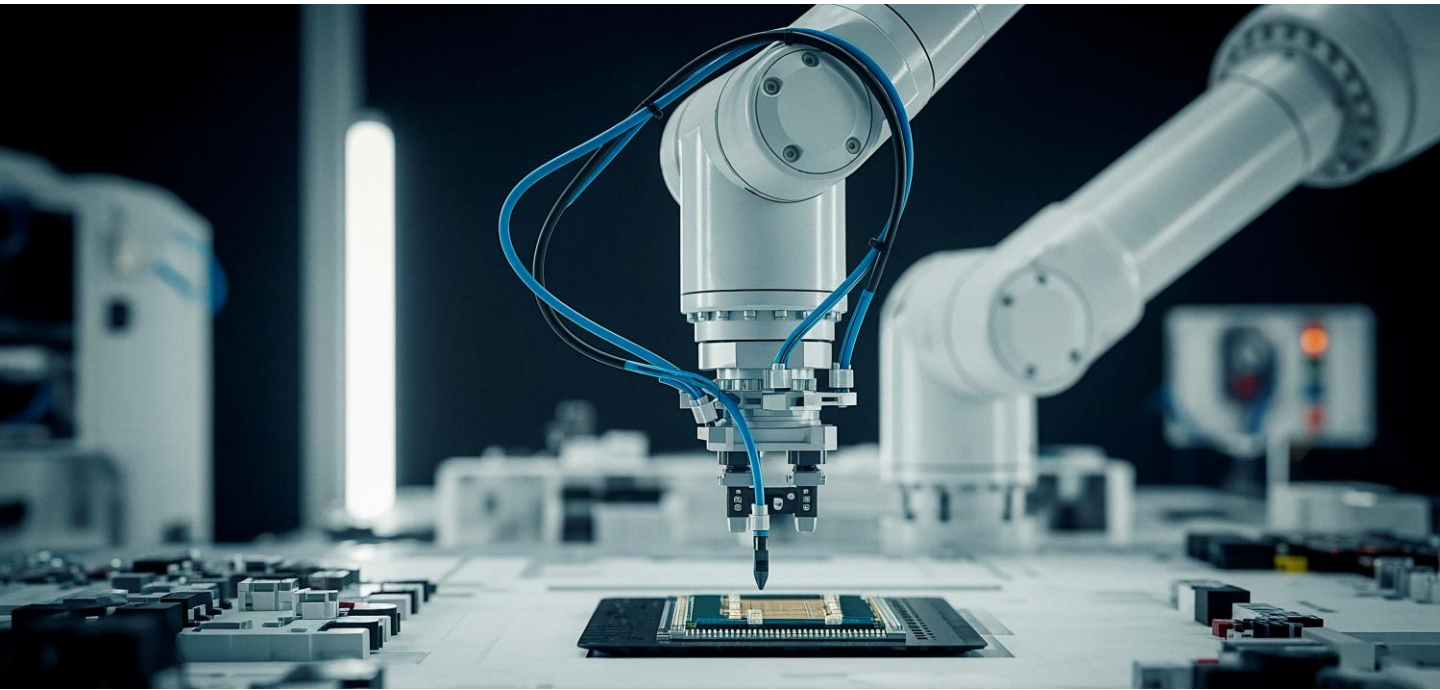
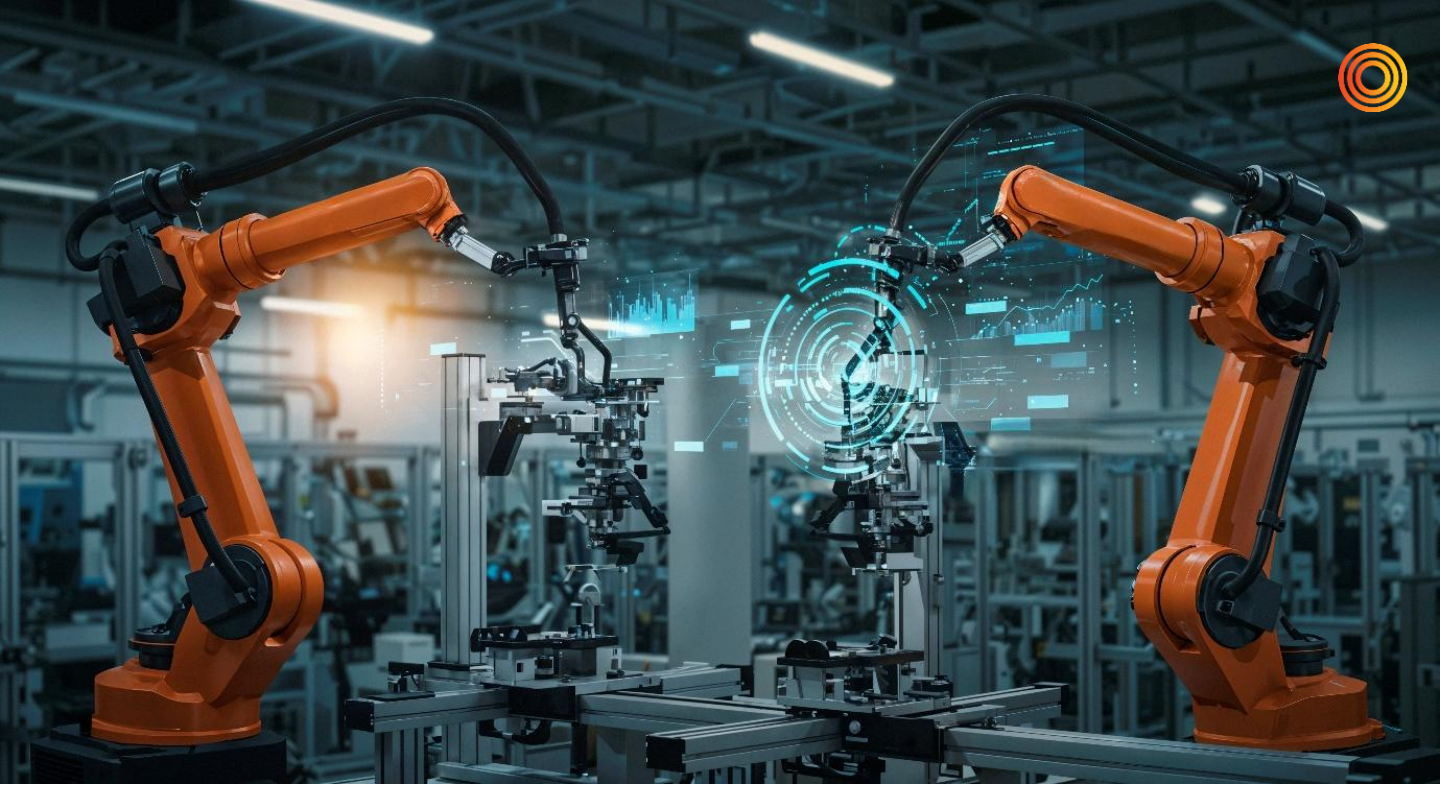
In April 2025, Morgan Stanley forecasted total addressable market for Robotics to be $25 trillion by the year 2050.

McKinsey forecasts that by 2030 AI-powered agents and robots could generate about $2.9 trillion in US economic value per year. Capturing this may depend less on new technological breakthroughs than on how organizations redesign workflows and how quickly human skills adapt.

The robots of the past executed a few pre-programmed actions with precision, whereas the robots that are being built for the multi-trillion billion market of tomorrow, are armed with artificial intelligence, mobility, and adaptability. These are robots that understand natural language and context, can employ agentic AI to complete multi-step tasks and even possess well-honed physical skills.

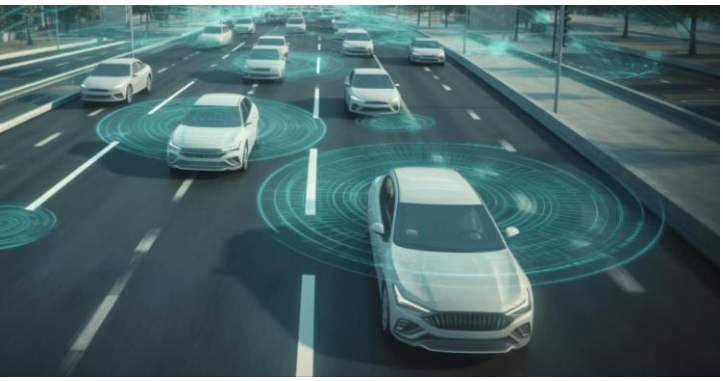




Investment capital is flooding into the robotics sector, driven by the convergence of advancements in artificial intelligence, tighter immigration and labour conditions, and a push for supply chain resilience. The sector saw global funding reach over $6.1 billion in 2024 and continuing to surge in 2025. In September 2025, Figure AI, a humanoid robotics startup raised $ 1 billion Series C funding at a valuation of $39 billion.

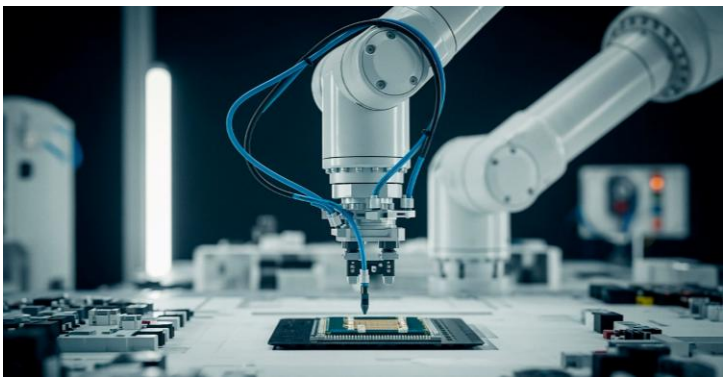
Capital is being allocated across the stack, from enabling components and perception systems to full stack robotics providers. As an investor, it has become increasingly important to identify business models capable of scaling as automation capex accelerates.

Some of the most promising use cases:



Autonomous Vehicles

Robotics & Industrial Automation



Drones

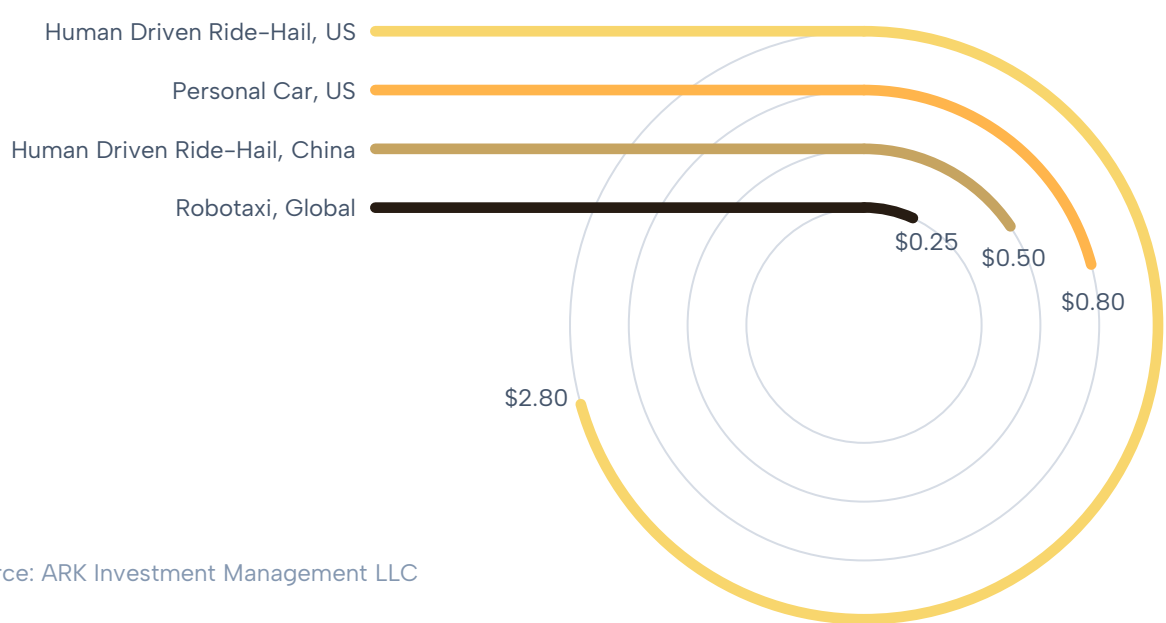
Space & Defense

Industry Adoption

The early adopters of robotics technology are likely to be the manufacturers, logistics operators, electronics assemblers, defence and the likes. These are sectors which are looking for speed, accuracy and quality control without the rising wage costs. As the robots get more intelligent and autonomous, they are likely to emerge in retail, hospitality, data centres, healthcare, transport, as well as household and social sectors.

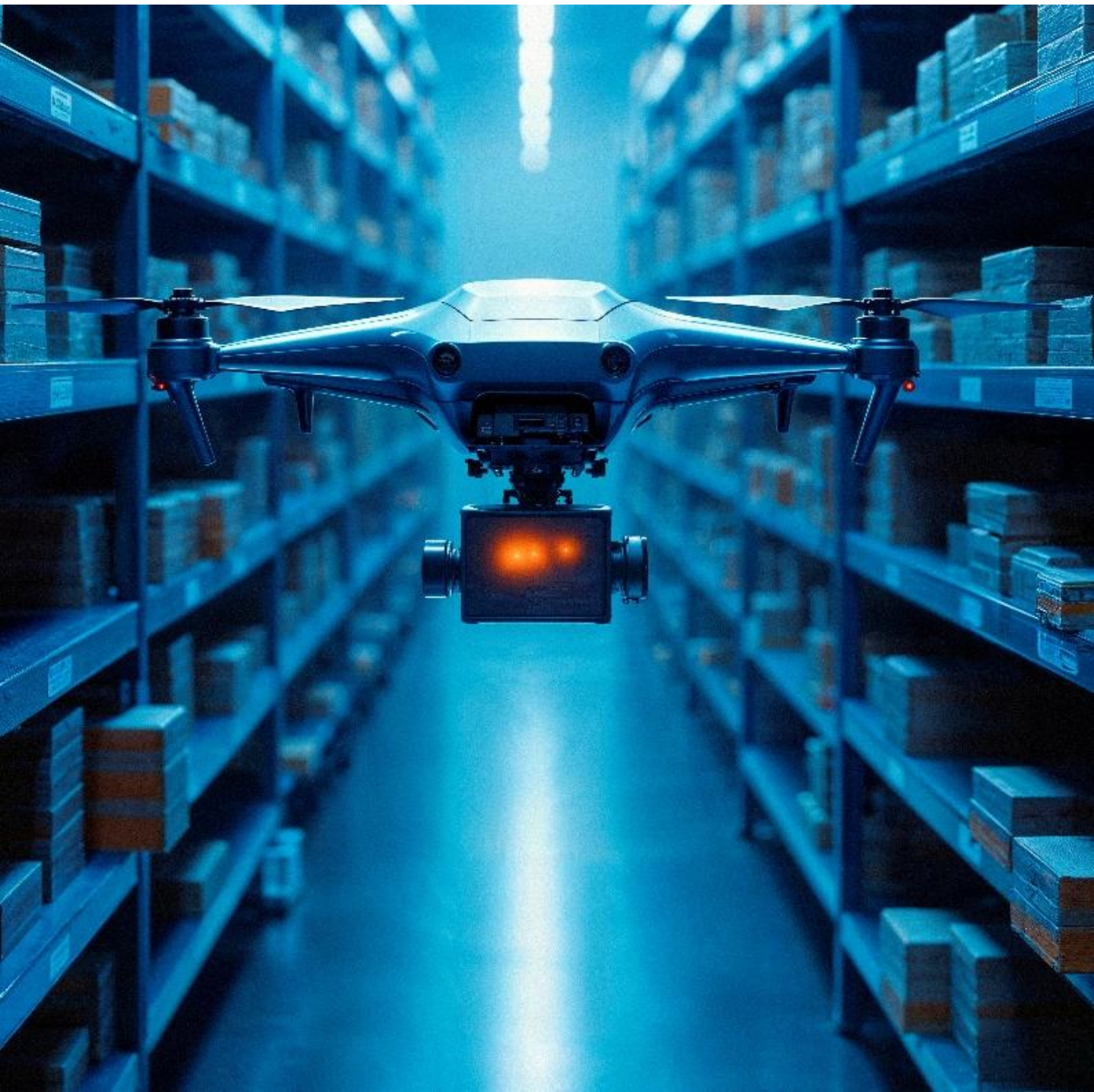
Alphabet's Waymo already delivers 250,000 autonomous rides weekly, in cities like Phoenix, San Francisco, Los Angeles, and Atlanta. It's also applying to operate in New York City and mapping Tokyo. Tesla, meanwhile, just launched its own robotaxi service in Austin. Rides cost as little as $4.20. The car drives itself, alongside a safety driver for now. Amazon-backed Zoox is also preparing for a major launch in Las Vegas later this year. To ensure safety and reliability for public use, robotaxis are undergoing rigorous testing.

Price per mile (2025E Dollars)

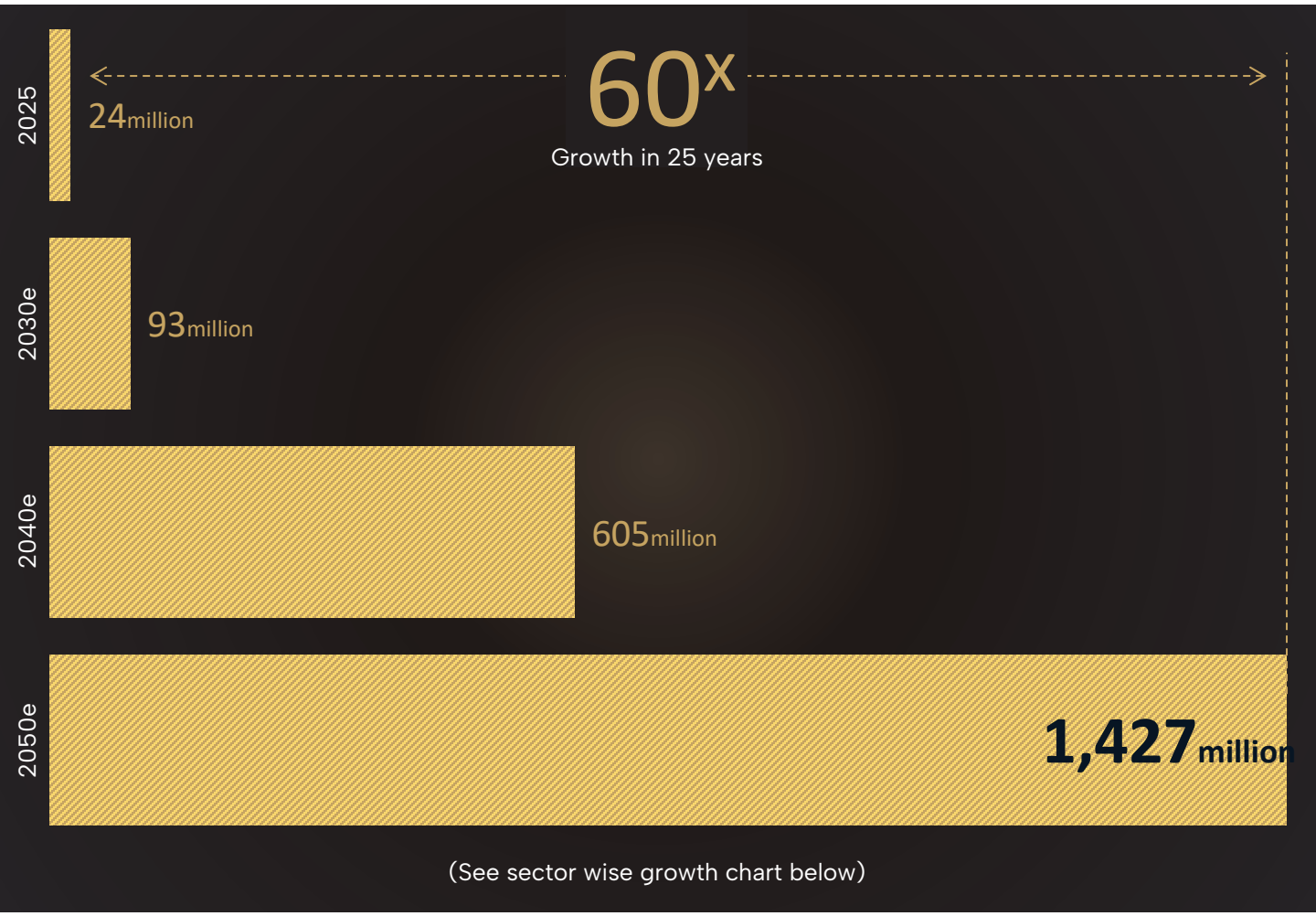


Source: ARK Investment Management LLC

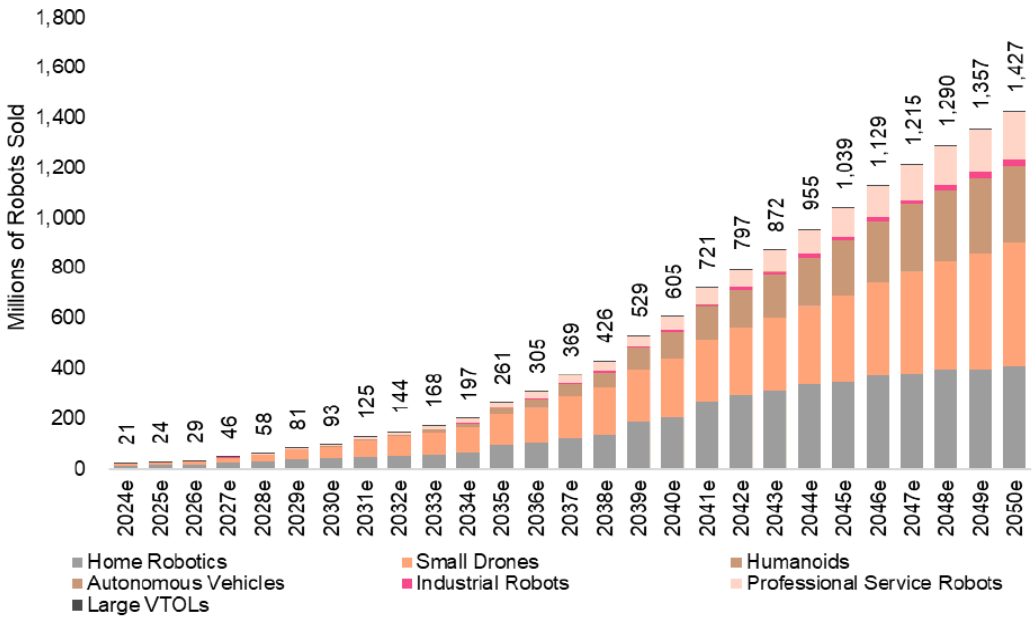
Meanwhile, Amazon employs over a million warehouse robots. These robots are busy lifting, sorting, packing, and transporting products with increasing autonomy. FedEx is using robots to load and unload trucks, while Walmart has announced it has robots at all 42 of its regional distribution centers. Tesla's humanoids are training in real factories. It's Optimus is a full humanoid, powered by Tesla's FSD AI stack and expected to launch externally as early as 2026.



The Market for Robots



(See sector wise growth chart below)



Source:Morgan Stanley

Evolution of Physical AI

Physical AI is the branch of artificial intelligence that enables machines to perceive, understand and meaningfully interact with the physical world. Unlike Generative AI, which operates in the digital domain, Physical AI gathers real-world input through sensors such as cameras, LiDAR, radar and processes it to generate physical action.

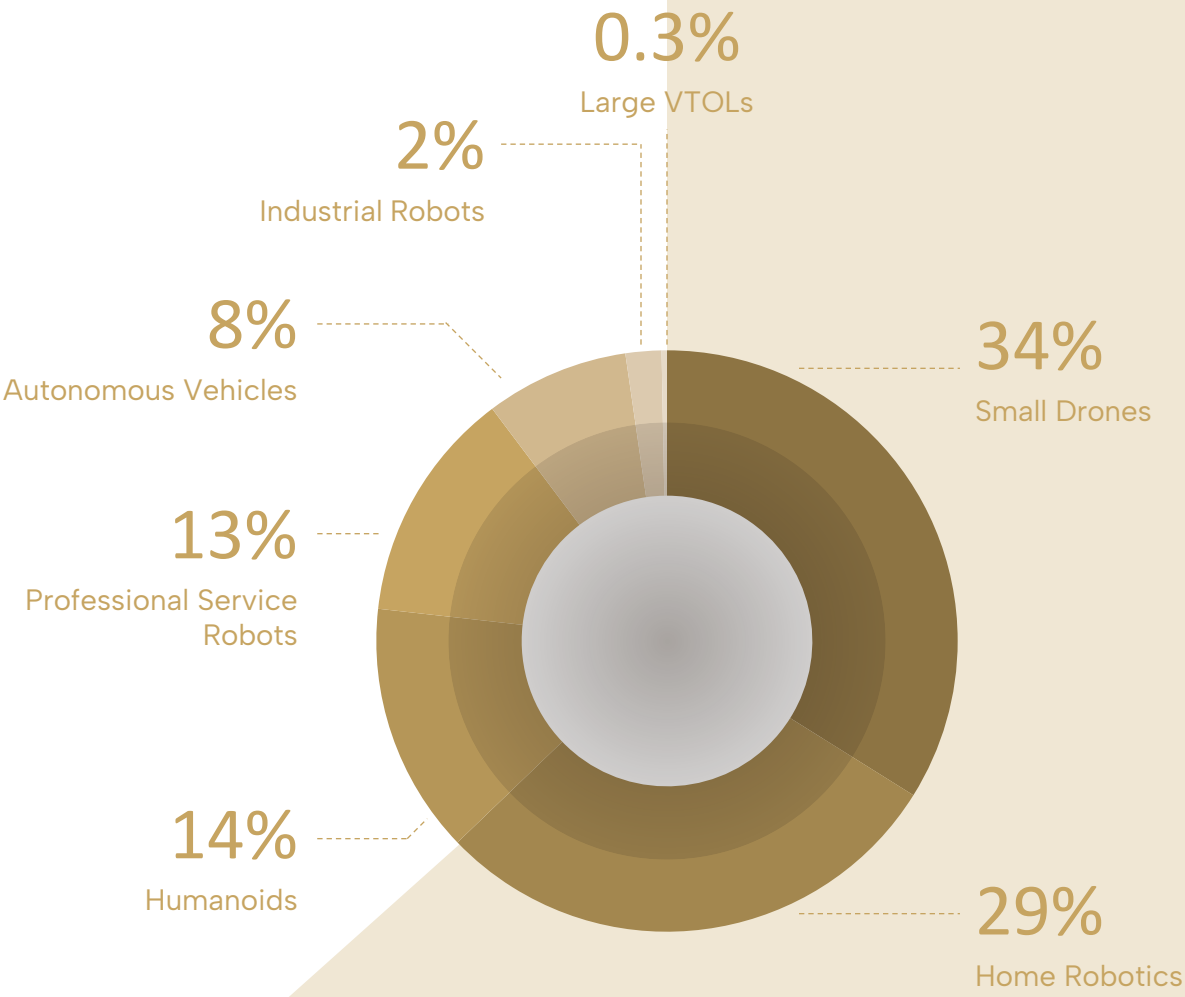
Nvidia's Isaac GR00T platform trains humanoids in simulation using real-world physics, and its new Rubin and Blackwell chips are designed to power them. Meta is also building its own robot operating system. In the meanwhile, China's UBTech will be launching a consumer-grade humanoid robot with a $20,000 price tag for families and households.

Currently approximately only 1%–2% of the total demand for chips comes from robotics

Content Needed	Current Demand	Expected to meet demand in 2050	Growth in Demand
Cameras	61 mn	5.7 bn	95x
Lidar	2.3 mn	700 mn	300x
Radar	2.3 mn	600 mn	260x
Semiconductors	$1.6bn	$330bn	210x
Magnets	3.5k tonnes	1.7mn tonnes	480x
Batteries	18 GWh	26TWh	1,450x

Source:Morgan Stanley

An Opportunity in Every Sector

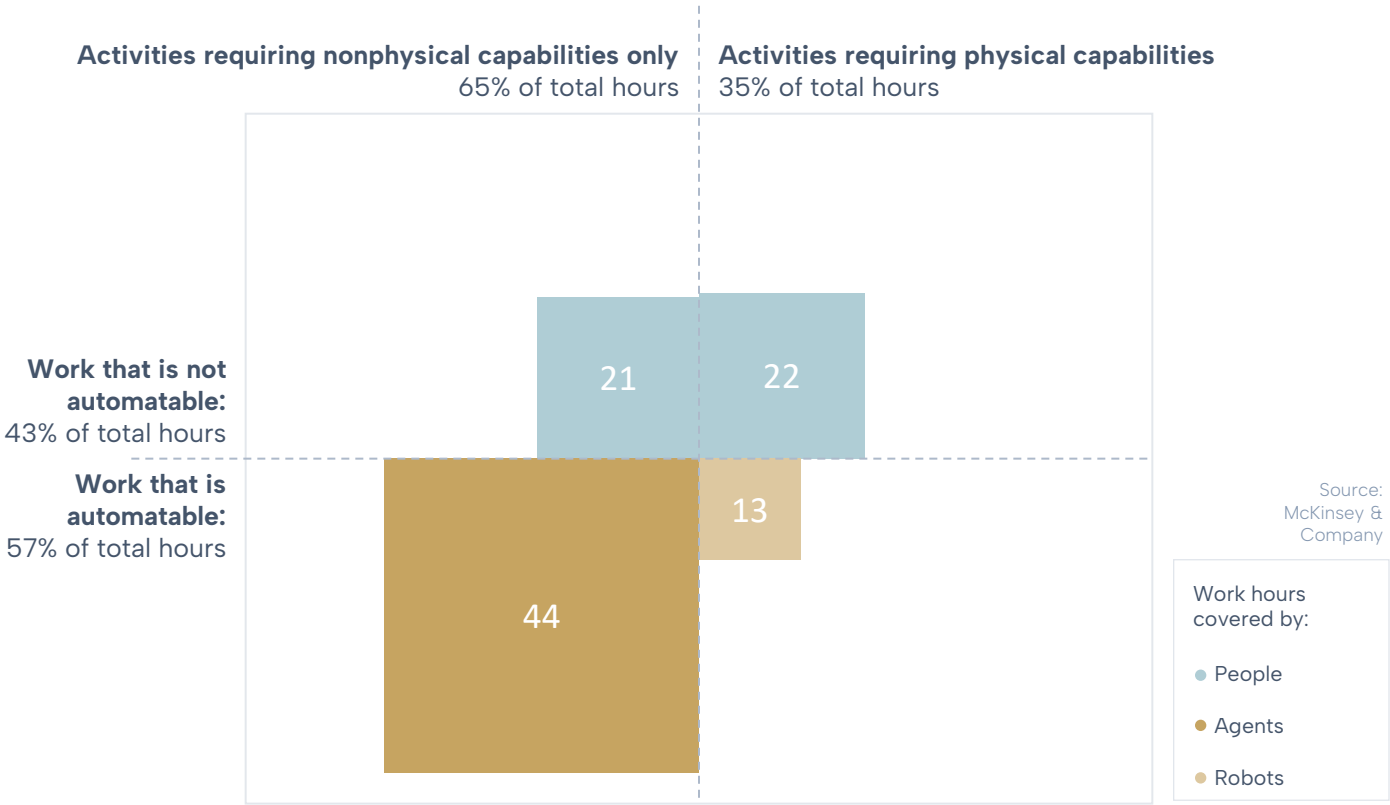


What the opportunity pie chart is likely to look like

Source:Morgan Stanley

People, agents, and robots could all play significant roles in the workforce of the future.

Distribution of work hours in the US, by technical automation potential, 2024, %



Catalysts to Watch For in 2026

- Big Tech & AI Unveil First Physical AI Products
- China Mass-Deploys Robots in Robo-Sputnik Moment
- Public Opinion and Awareness to Autonomy Matures
- Legacy Industrial Companies Begin to Ramp Adoption

How to capture this opportunity?

Jupiter Wealth Advisors' investment team reviews listed companies in the universe of AI development, autonomous vehicles, humanoid development, industrial robots, drones, defence and space innovation. Our team also tracks some interesting funds and ETFs in this sector and has several product ideas around this sector. From time to time, our corporate advisory team also brings interesting private market opportunities in this sector. Speak to your advisor today to learn more.

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