

NovaAI Robotics Market Report

Q3 2025

Confidential

1. Introduction

Industrial robotics adoption continues to accelerate, driven by labor shortages, rising wages, and the need for more flexible automation. Despite macro uncertainty, investment in robotics remained strong, particularly in mid-market manufacturing and logistics.

2. Market Segment Overview

Key segments:

- Autonomous mobile robots (AMRs)
- Industrial arms with adaptive perception
- Collaborative robots (cobots)
- AI-driven autonomy layers for existing systems

Primary customer pain points:

- High reprogramming costs
- Inability to adapt to dynamic environments
- Low uptime due to calibration failures
- Integration complexity

3. Market Size & Growth

- 2025 global market: \$18B
- 2030 expected: \$35B–\$40B
- 9–12% CAGR
- Fastest growth in mid-market manufacturing (SMEs adopting automation for the first time)

4. Competitive Landscape

- Legacy players: Fanuc, ABB, KUKA
- New AI-first companies: Covariant, Intrinsic, Flexiv
- Differentiation increasingly shifts from hardware → autonomy + adaptability
- Switching costs decreasing due to modular autonomy offerings

5. Strategic Relevance to NovaAI

- Confirms demand for autonomy-first positioning
- Creates OEM licensing opportunities
- Shorter sales cycles in mid-market segments
- Provides multiyear revenue potential through tiered subscriptions
- Aligns with our long-term roadmap toward broad autonomy orchestration