



On a long enough timeline the survival rate for everyone drops to zero.

There's An iPhone Moment Happening With Humanoids



BY TYLER DURDEN

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By Eric Peters, CIO of One River Asset Management

“There’s an iPhone moment happening with humanoids,” said Brett Adcock, founder of Figure, a humanoid robotics company in California. “It’s going to happen right now,” added the serial entrepreneur, **his robots already working on the production line in BMW’s Spartanburg factory.** Another major corporate customer is trialing his robots for warehouse work. “To succeed at this, you have to do three things that have never been done before. And you have to get all three of them right within the next 5yrs or you’re going to fail for sure.”

“The first thing is you have to build hardware for humanoids that’s incredibly complex and can never fail, and it’s got to work at human speeds with human range of motion,” explained Adcock. “The second thing is a neural net problem, not a control systems problem. You can’t code your way out of this problem. You need to have a robot that can ingest human-like data through a neural net and it has to be able to imitate what humans do. **Humanoid robots are not like arms bolted to a factory table. None of those robots have AI.**”



Figure's Humanoid Robot Will Do Your Chores With ...



“The third problem is that you then have to generalize. This is the holy grail of robotics,” explained Adcock. “To have a robot look at something it’s never seen before, or heard through speech, and to be able to tell a robot how to do it, and then have it be able to complete that task end to end with one neural net,” he said. **“If you can solve those three things, then you’re in the right decade and you’re at the iPhone moment,”** he said. **“And we can confidently say we have solved or are making major progress on all three problems.”**

“If we had 100,000 robots today that all worked, our two commercial customers would take them all,” said Adcock, not able to leverage scaled up supply chains because they do not yet exist, it’s still early. Which nation wins remains up for grabs. “And we could sign on fifty Fortune 100 companies by the weekend. We are bombarded by demand. The supply of humans is going down.” The working age population is in steep decline across the developed world. **“There is unbounded demand. We could ship 1-million robots this month if they were all ready to go.”**

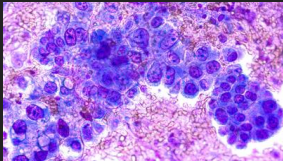
I asked Perplexity to tell me about the leading companies that are producing humanoid robots. Perplexity is an AI that excels in searching the web for the most up-to-date information. I now use different robots depending on the type of task. I’d guess that someday soon we’ll all have multiple robots. Anyhow, Perplexity gave me the top ten companies. Brett Adcock’s Figure, Boston Dynamics, many others I’d never

heard of. Tesla made the list of course, its Optimus humanoid robot, run on a proprietary AI, getting smarter every day I drive.

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