



Kconnect AI
NOW IS THE M.AX

Embodied AI: Beyond Physical AI

KOIIA 한국산업지능화협회
KOREA INDUSTRY INTELLIGENTIZATION ASSOCIATION



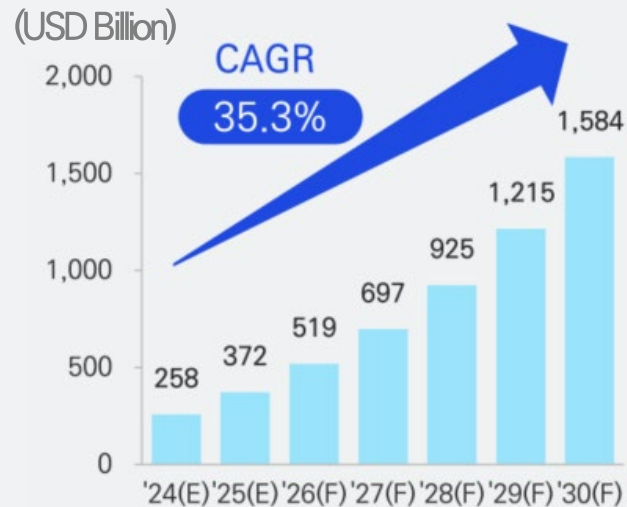
**Industrial
AI EXPO
2026**

**October 21-23, 2026
KINTEX Exhibition Center 1,
Goyang, Korea**

Global AI Market

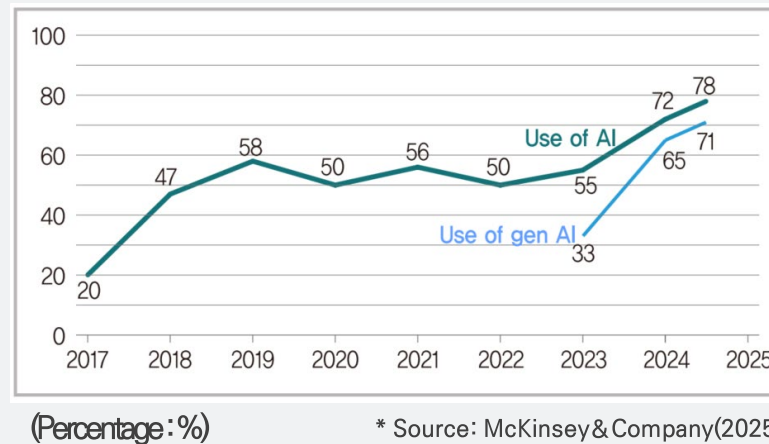
**The Global AI Market Is Set to Reach USD 1.6 Trillion by 2030
— Enterprise AI Adoption Is Rapidly Accelerating**

Global AI Market Growth Forecast



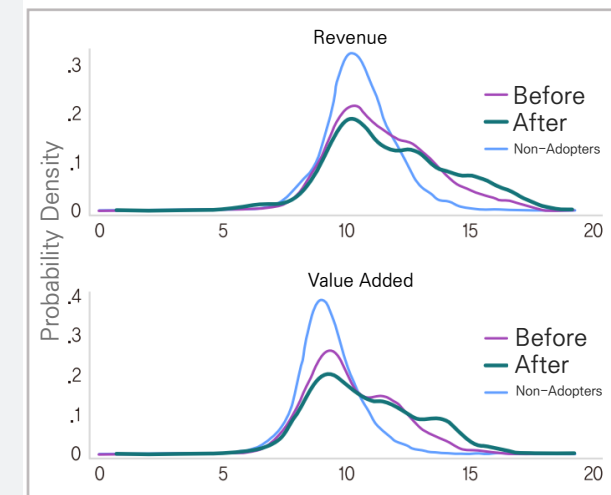
* Source: MarketstandMarkets, KPMG Economic Research Institute

Percentage of Companies Using AI in Business Operations



* Source: McKinsey & Company (2025)

Business Performance Impact of AI Adoption



* Source: Samsung Global Strategy Institute (2025)

- ▶ The global AI market is experiencing explosive growth, projected to reach approximately USD 1.6 trillion by 2030.
- ▶ Enterprises are rapidly adopting AI and Generative AI as core tools for productivity, efficiency, and competitive advantage.
- ▶ Companies that have adopted AI consistently outperform non-adopters, showing higher revenue growth and greater value creation.



Global AI Supply Chain Reconfiguration

Accelerating Strategic AI Partnerships Among Global Big Tech Companies

The growing importance of building **strategic partnerships and developing collaboration models within a reconfigured AI supply chain**

The need to identify **networking opportunities between domestic and global companies to expand global business collaboration**

Across all industries, the world is accelerating the formation of **global ecosystems and the reconfiguration of supply chains** to enable **AX (AI Transformation)** at scale

Industrial AI EXPO serves as a global platform where these strategic partnerships begin — connecting AI innovators with industrial leaders and manufacturers.



- Infrastructure & Ecosystem Partnerships(e.g. OpenAI – Samsung – SK)
- AI Supply Chain & Technology Alliances(e.g. OpenAI – AMD)
- M&A for AI-Industrial Convergence(e.g. SoftBank – ABB)



Global AI Market Entry

APEC 2025 Follow-up Announcement “AI as the New Compass for the Era of Major Transformation”

#National Growth Strategy

Proposal of the 2025 APEC AI Initiative

#Government AI Policy Direction

Korean Government Announces Vision
to Become a Top 3 Global AI Power

#Industrial AI Ecosystem

Launch of the M.AX
(Manufacturing AI Transformation) Alliance

According to the Minister of Trade, Industry and Energy, Korean companies must seize AI as a new compass to navigate global markets and lead future growth

Source: Keynote speech by the Minister of Trade, Industry and Resources at the ‘Korean Enterprise CEO Forum’

Industry Outlook

• The Core of the AI Era: Physical Industries

- Supply chain reconfiguration is expanding demand for Korea’s machinery and robotics industries
- Embodied AI enables physical assets (robots, machines) to perceive, decide, and act in real-world environments

• Korea’s Next Chapter: Becoming a Global Manufacturing AI Leader

- Embodied AI is emerging as a core growth strategy among advanced economies, yet global leadership remains undefined, creating a window of opportunity.
- Manufacturing-centered Embodied AI development, leveraging Korea’s strengths in production systems, robotics, and industrial data.
- Korea is becoming a strategic stage for global Embodied AI, serving as a testbed and showcase connecting technology providers, manufacturers, and global partners.





MOTIR(Government)-led AI-Centered Manufacturing Innovation → Industries align strategies with national AI policy

Expanding **public-private collaboration for industry-specific AI models** in manufacturing



산업통상부

Ministry of Trade, Industry and Resources

*“By maximizing inter-company collaboration based on manufacturing competitiveness, Korea aims to become a **global leader in Manufacturing AX by 2030.**”*

As the first priority of Korea’s “Three Real Growth Strategies,” MOTIR emphasizes the full-scale implementation of the M.AX Alliance to accelerate Manufacturing AX(AI Transformation).

* Policy Focus: “Three Real Growth Strategies”

① M.AX Alliance (Launched Sep 10, 2025)

- Sector-based AI alliances(AI Semiconductors, AI Manufacturing Services, AI Factories)
- Joint participation of manufacturers, AI firms, suppliers, academia, and research institutes
- Focus on data sharing, joint development, and real-world deployment

Embodied AI?

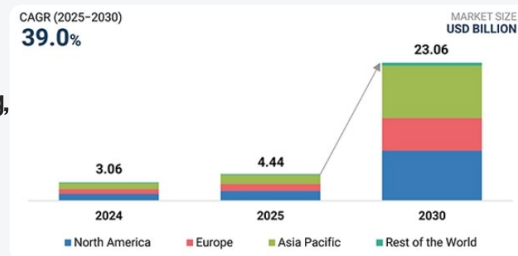
Recognized as a Top 5 future technology, Embodied AI integrates artificial intelligence with physical systems. Representing the convergence of AI, Machinery, and Manufacturing, enabling autonomous decision through experiential learning.

*“Moving beyond Software, an **Intelligent Agent with Physical Embodiment**—such as robots, drones, or humanoids”*

Global, Domestic Industry Trends of Embodied AI

Global Industry Trends

- ▶ Projected Market Growth:
Scaling from \$4.4B to \$23B by 2030 (CAGR of 39%)
- ▶ Rapidly expanding across sectors including Manufacturing, Logistics, Healthcare, Retail etc.
- ▶ Embodied AI is emerging as the core element of strategies across global enterprises, national policy and industrial applications, but there is still no leading nation.



(출처: Secondary Research, Interview with Experts, MarketandMarkets Analysis)

Domestic Industry Trends

- ▶ Embodied AI, A Strategic Leap Toward “Top3 Global AI Powerhouse”
Synergizing distinct strengths in Manufacturing Data, Hardware, Robotics and AI control Tech to pioneer a globally competitive “Korean Manufacturing Innovation Model”
- ▶ Driving the Physical AI ecosystem and Strategic Growth plan as a core pillar of the 123 National Policy Task
Redesigning regulations for On-site adoption & Acceleration industrial PoCs & Fostering Global-Tier Physical AI, Robotics R&D
- ▶ MOTIR’s Roadmap, ‘Expanding to over 100 Humanoid Pilot Projects’ by 2027
Launching the government-led ‘K-Humanoid Alliance’ to build a comprehensive R&D and PoC ecosystem. The acquired data and technological capabilities will be integrated into a full-scale humanoid mass production framework by 2028.

K Connect AI



Ministry of Trade, Industry
and Resources

Korea's Flagship Global B2B Exhibition & Platform

Actualizing AI-driven industrial innovation policies & Cultivating sector-specific ecosystems

Domestic Business Acceleration

Serving as a premier PoC, commercialization and business networking platform bridging AI technologies with machinery, manufacturing, and broader industries

KOIIA
KOREA INDUSTRY INTELLIGENTIZATION ASSOCIATION

KOAMI
KOREA ASSOCIATION OF
MACHINERY INDUSTRY

KEA | Korea
Electronics
Association
한국전자정보통신산업진흥회

KSIA 한국반도체산업협회
KOREA SEMICONDUCTOR INDUSTRY ASSOCIATION

KAR
Korea Association
of AI Robot Industry

Global Business Partnerships

Facilitating strategic international collaborations to accelerate export and expand the global footprint of domestic enterprises

kotra

Korea Trade-Investment
Promotion Agency



Date October 21(Wed)~23(Fri), 2026



Location KINTEX Exhibition Center 1



Contents

- ① Exhibition ② Global AI Conference
- ③ Export Consultation ④ Events (Industrial AI Convergence Zone, K-Contents Showcase)



Category

- (Industrial AI) AI Manufacturing, AI Semiconductor, AI Energy, AI Distribution & Logistics, AI Bio · Healthcare, AI Mobility
- (AI Tech) AI Infrastructure/Platform, Embodied AI, Agentic AI, AI Orchestration

Host MOTIR, MOFE

Co-Organizer KOIIA, KOAMI



Co-located Events Korea Electronics Show, SEDEX, RobotWorld

Exhibition Scale

1,500+

Domestic Exhibitors

1,000+

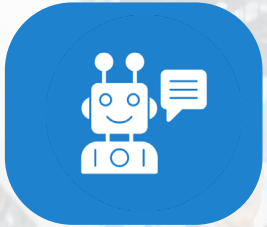
Global Buyers

150,000+

Expected Attendees



| Embodied AI, Where to find Business Opportunities and Strategic Partners?



"AI & Robot-Driven Manufacturing Innovation" is rapidly emerging as a Core National Strategy

→ Need of a unified platform to bridge industrial AI technologies with broader industrial sectors

2026 Industrial AI EXPO

2026
Industrial
AI EXPO

Showcasing **Leading Industrial and Embodied AI Cases** among Data → AI → Robot → Machinery Lifecycle,
Serving as a **Business Networking Platform** connecting Policy - Industry - Market - Technology

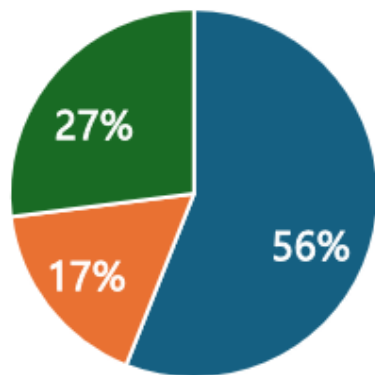
Customer
Type

1

Rising Demand for Improvement of System & Advanced AI Integration
→ **Unlocking Markets for System Replacement & Upselling**

70% of Adopters, Seek to Upgrade Automation System

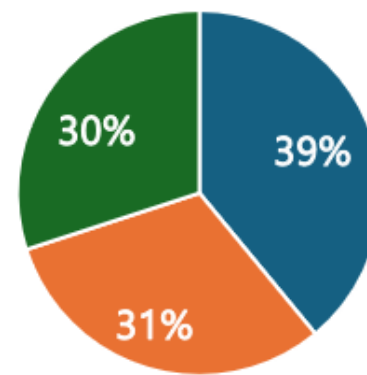
<Operational Satisfaction of Current Automation System>



- Experiencing minor operational issues; actively exploring improvements
- Urgent overhaul required; frequent system conflicts
- Operating stably; generally satisfied with current performance

40% of Adopters, Face Challenge in AI Deployment & Scaling

<Challenges in Adopting AI-Smart Manufacturing & Edge>



- AI Proliferation; challenges in system scaling & wider deployment
- Limitations in data readiness & IT infrastructure
- Lack of internal expertise & execution frameworks

What do our customers need?
Proven field-deployment know-how from providers with
AI solutions and industrial domain expertise!

Capture System Replacement Deals!

Unlock Upselling Potential!



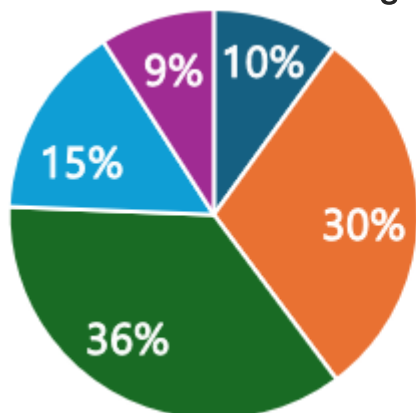
Customer
Type

2

High Volume of Buyers with Near-Term AI Investment Plans
→ Direct Pipeline to High-Intent Buyers and Immediate ROI

66% of Adopters, Currently in the “Evaluation Phase”

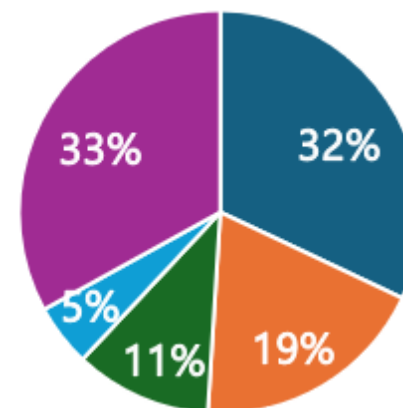
<Stages of AX Adoption>



- LEVEL 0: Not actively considering AX
- LEVEL 1: Recognizing the need for AI, but lacking a clear strategic direction
- LEVEL 2: Defining target areas and reviewing phased implementation roadmaps
- LEVEL 3: Actively deploying AI in specific processes or conducting PoCs
- LEVEL 4: Expanding and optimizing AX across the entire organization

51% of Adopters, Planning Investments within 3 years

<Planning Investments in AI Infrastructure>



- Within 1~3 years
- Within 1 year
- Within 3~5 years
- After 5 years
- No plans

What do our customers need?
Actionable AI Adoption Strategies with Proven Industrial Use Cases!

Generate Leads Ready to Convert into Active Buyers!



**“Industrial AI Business Platform for Cooperation, Networking, and Revitalizing the AI Ecosystem”
— Industrial AI EXPO 2026 —**



**A Platform for Vertical AI
Adoption & Expansion**

(2025) Korea's first manufacturing-focused
Vertical AI showcase,
Vertical AI technologies and use cases,
Foundation for Industrial AI adoption

2026

A networking platform
accelerating Industrial AI &
Manufacturing AX



**Building B2B Pipelines &
Expanding Global Partnerships**

(2025) Participation with
global/leading domestic partners
(HD Hyundai, Microsoft, Dassault System,
HP Korea, NVIDIA, Salesforce)

2026

- Collaboration with leading Korean companies
- Attraction of overseas companies from Taiwan, China, and beyond
- Specialization and strengthening of Manufacturing AI sectors



**Expanded Business Support
Programs & Networking**

(2025) Conferences, seminars, and IR
pitching, 1:1 business matchmaking,
International certification forums

2026

Expanded business-driven programs
(Buyer consultation sessions,
Stronger networking directly
linked to deals)



Large-Scale Industrial AI Exhibition
(133 companies / 320 booths,
first large-scale showcase of
Physical AI and Industrial AI
equipment & solutions)

2026

Expanded scale of the
Industrial AI EXPO 2026

- 150 exhibitors / 350 booths
- 30,000+ visitors



I Event Overview



Name	Industrial AI EXPO 2026
Date / Venue	October 21(Wed) – 23(Fri), 2026 / Hall 2 KINTEX Exhibition Center 1, Goyang, Korea
Main Theme	Embodied AI: Beyond Physical AI
Organizer	KOIIA
Co-Organizer	KOAMI Messe, KOTRA
Sponsor	MOTIR
Media	Chomdan
Co-located Event	Asia Machinery & Manufacturing EXPO KOREA (AMXPO)
Events	① Opening Ceremony & VIP Tour ② Exhibition Zones ③ Industrial AI Conference ④ Programs: Industrial AI Convergence, K-Content Promotion Pavillion ⑤ Biz-Connect Programs: AI-Tech Seminars, B2B Consultation Meeting, IR Pitching, etc.
Scale	300 Exhibitors 1,000 Booths 40,000 Visitors

* Leading Enterprises in Manufacturing AX & I Industrial AI, Public Institutions, Research Institutes, Academia

Theme

Embodied AI: Beyond Physical AI

➔ Realization of AI-driven industrial transformation

➔ Strengthening business networking

➔ Industry-academia-research collaboration

Industrial AI Policy Zone

- ✓ Introduction of Industrial AI policy directions and corporate support programs
- ✓ Showcasing leading cases of Industrial AI and Manufacturing AX

Public Sector Zone

- ✓ Outstanding technologies, technology transfer, commercialization, and financial support
- ✓ Presentation of agency-led Industrial AI project initiatives and best practices

Region / Academic

Private Sector Zone

*Exhibition items are subject to change.

AI-Tech & Orchestration Zone

AI Infrastructure/Platform	Embodied AI	Agentic AI	AI Orchestration
- Data collection & big data - Data lake / Data warehouse - Data governance & platforms - Cloud - AI Computing, Quantum Computing - Edge AI - Networking & communications - MLOps - Security for AI - AI Highway	- Physical AI - Humanoid - Industrial robots - Collaborative robots - Mobile robots / Logistics robots(AGV/AMR) - Machine vision - Autonomous / Mobile Robotic Systems - RaaS - On-device AI - Robot & Automation SI	- AI Agent - Gen-AI - FM - LLM - Text / Image / Video / Audio generation - Deep Learning, Machine Learning - NLP - Interactive AI / Cognitive AI - AlaaS(AI as a Service)	- Orchestration software - Digital twin platform - AI orchestration platform - Factory orchestration - Autonomous manufacturing solutions - Autonomous production systems - AI management systems - Autonomous Driving - Autonomous System - Reinforcement System

Industrial AI Zone

AI Manufacturing	AI Semiconductors	AI Energy	AI Distribution & Logistics	AI Bio·Healthcare	AI Mobility
- AI Factories - Manufacturing AI Platforms & Services - Asset & Maintenance Management - Predictive Maintenance - MES - Process Optimization & Advanced Process Control (APC) - Supply Chain Planning & Customer Operations - Quality Inspection & Safety - Simulation & Digital Twin - Smart Packaging	- Design Automation for AI Chips - GPU/NPU/TPU - HBM - Advanced Packaging - AI Accelerators - Chiplets - Embedded	- Energy Forecasting & Storage Optimization - Demand Forecasting & Load Prediction - Energy Optimization & Control - Energy Efficiency - Virtual Power Plant (VPP) Solutions - AI-driven Carbon & Energy Resource Management - Smart Grid - Energy Highway	- Retail & Distribution AI - Demand Forecasting - Inventory Optimization - AI Customer Service - AI Logistics - Warehouse Automation - Delivery Route Optimization - SCM - Last-Mile Optimization	- Bio Data/AI - Bio IoT/SW - AI Medical Devices - Wearable Devices - AI Healthcare Services - Biomedical Data Analytics	- Mobility Services - Green Mobility - Autonomous Driving - Autonomous Navigation - Advanced Air Mobility - MaaS



Industrial AI & Manufacturing Innovation Conference 2026

AI Applied to Real Industry

Strategies, Case Studies and Business Insights for the Next Industrial Transformation

Discover how leading companies are putting Industrial AI into practice and creating real business value across industries.

CONFERENCE OVERVIEW



Date

October 22, 2026 (Thu)



Venue

KINTEX 1 Exhibition Hall 2



Theme

AI Applied to Real Industry



Target Participants

Companies, institutions and industry stakeholders who are interested in developing AI strategies and applying Industrial AI.

CONFERENCE FOCUS

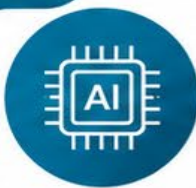
01



Industrial AI Strategy

Insights from leading Korean and global companies on how to build and scale Industrial AI

02



Real-World Applications

Proven implementation cases across manufacturing and key industrial sectors

03



Business & Technology Outlook

Emerging technologies, market trends and new opportunities shaping the Industrial AI era

Join the Industrial AI & Manufacturing Innovation Conference 2026 and explore practical insights and new opportunities for your business.

AI-Tech Seminars

Showcasing AI New Technologies & Products and Sharing Best Practices

AI
Manufacturing

AI
Semiconductor
& Computing

AI
Energy & Industrial
Infrastructure

Enterprise AI &
Work Innovation

AI Bio &
Healthcare



IR Pitching

Strategic Networking Opportunities with Innovative AI Startups,
Attract Investments, Accelerate Ecosystem Growth

IR
Pitching

AC/VC
Meetups

Open
Innovation
Program

4 Programs - Business Connect Program

Business Connect Program

A partnership and networking support program to accelerate Industrial AI adoption and collaboration

*Program details subject to change

1:1 Buyer Consultation Meetings



Invitation of domestic and global AI-demand companies
(Opportunities to identify public-sector demand and global partners)

Industry-Specific Partnership Matchmaking



B2B matchmaking programs tailored for key sectors
(Manufacturing, Robotics, Automotive, Biotechnology, Energy)
designed to maximize opportunities for strategic alliances and business partnerships

New Product & Technology Launch Showcase



(2025) 35 companies / 48 new products & solutions unveiled
→ Press invitation & open showcase sessions
to amplify visibility of corporate launches

Delivering Unparalleled Access to Qualified Leads and Business Opportunities!

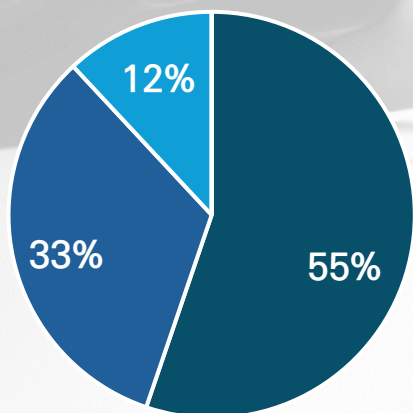
Industrial AI EXPO Exhibitor Testimonials

“We were genuinely impressed by the volume of actual, decision-making buyers.”

“It was an exceptional opportunity to connect with high-intent buyers.”

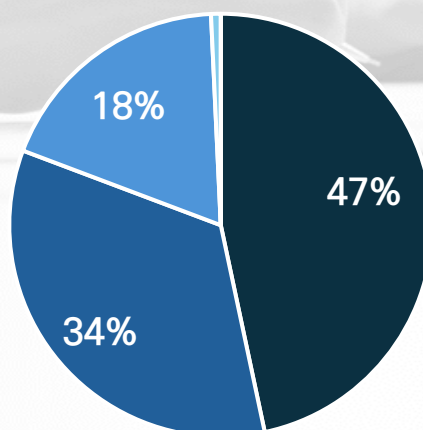
“Nearly every visitor held potential to convert into a concrete business contract.”

Exhibitor Satisfaction



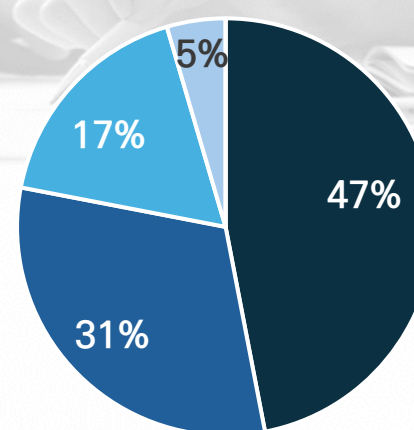
5 Highly Satisfied
4 Satisfied
3 Neutral
2 Dissatisfied
1 Very Dissatisfied

Achievement of Business Objectives



5 Very Helpful
4 Helpful
3 Neutral
2 Unhelpful
1 Very Unhelpful

Intent to Exhibit in 2027



5 Very Likely
4 Likely
3 Neutral
2 Unlikely
1 Very Unlikely

Exhibitor Report

Total 133 Enterprises, 320 Booth

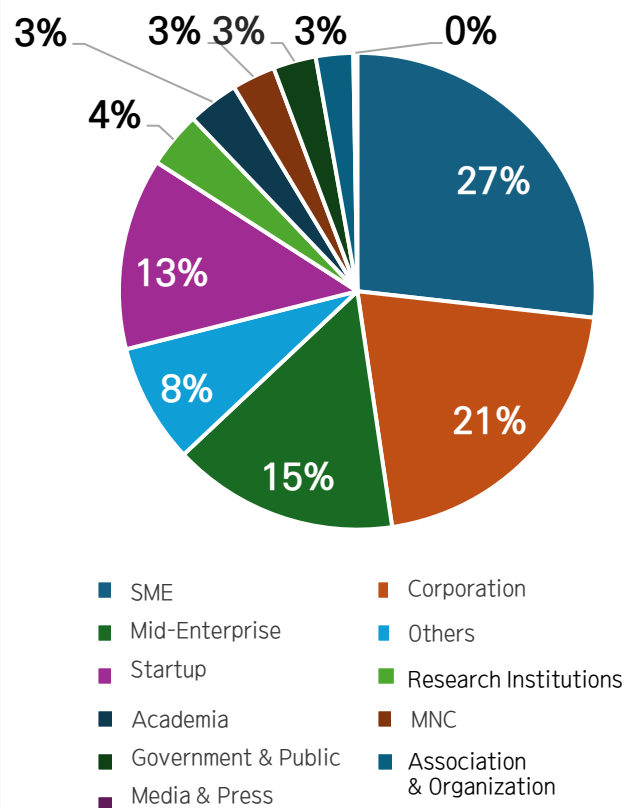
Overall Exhibitor Satisfaction
Satisfaction 88%

Achievement of Business Objectives
Achieved 81%

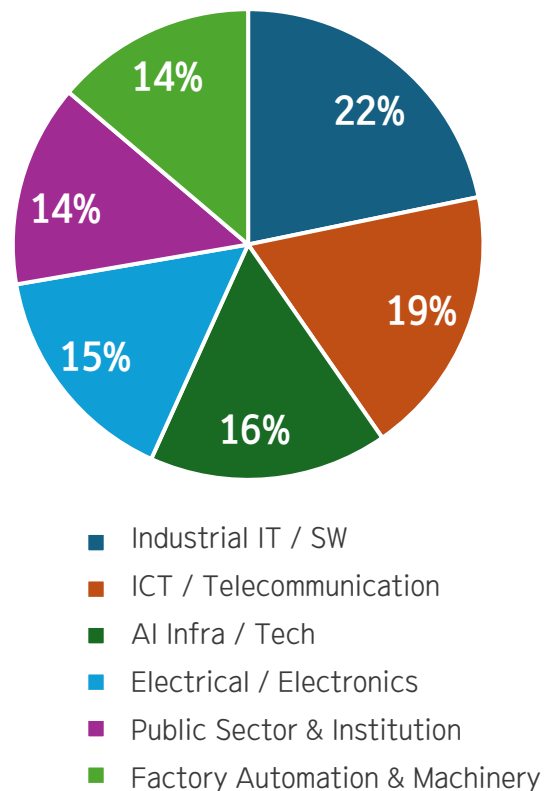
Intent to Exhibit **78%**,
High volume of early applications

**Massive Turnout of 21,709 Visitors! With over 79% of corporate professionals,
→Accelerating B2B networking, Technology & Solution Adoption**

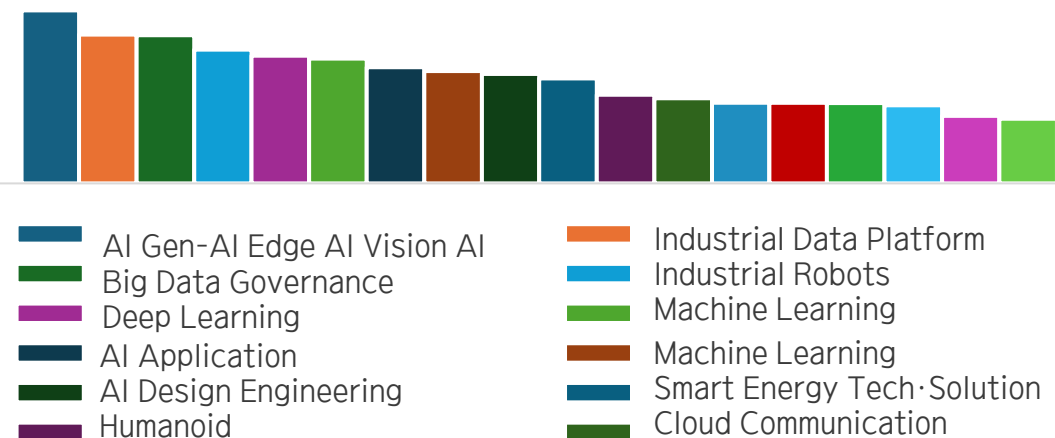
Visitors by Company Type



Visitors by Industry Sector



Key Areas of Interest



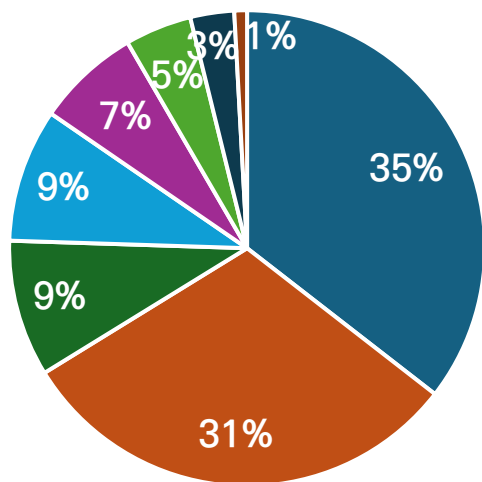
Attendees Report



- ✓ 73% of visitors represent Startups, SMEs, Mid to Large Enterprises
- ✓ SMEs(27%), Corporations(21%) account the largest shares, showing strong engagement
- ✓ 72% Coming from IT·SW·ICT·AI·Electronic/Electionics

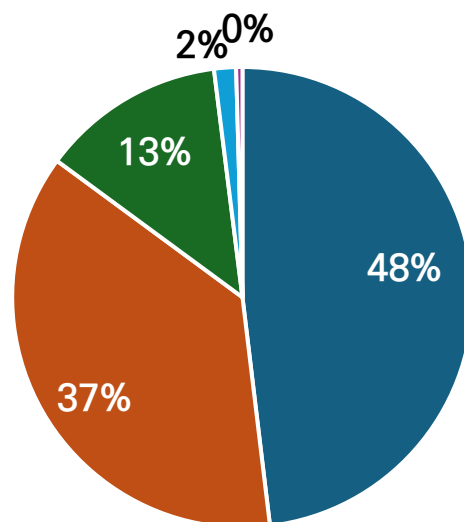
Visitor Satisfaction

Purpose of Participation



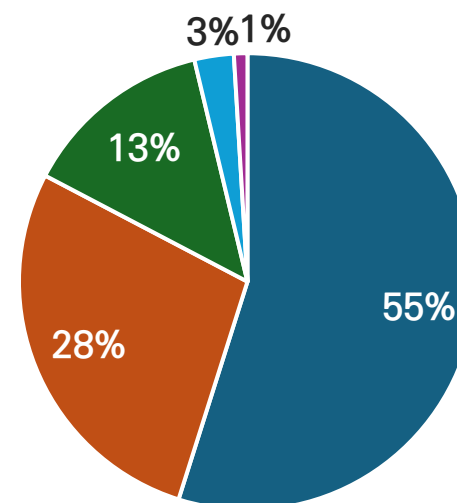
- Market Research
- Sourcing New Tech Info
- Exploring Partnerships
- Education
- Purchasing & Procurement
- General Interest
- Generating Sales Leads
- Engaging Existing Clients

Visitor Satisfaction



- 5 Very Helpful
- 4 Helpful
- 3 Neutral
- 2 Unhelpful
- 1 Very Unhelpful

Intent to Exhibit in 2027



- 5 Very Likely
- 4 Likely
- 3 Neutral
- 2 Unlikely
- 1 Very Unlikely

Visitor Report

Sourcing New Tech Info(29%),
Market Research(28%)
Purchasing/Procurement,
Networking, Cooperation(15%)

- ✓ Functioning as a Hub for generating transactions and strategic collaborations

► Purpose of Participation

- Most needs were directly linked to corporate decision-making, such as gathering tech info and market trends
- About 15% of total responses indicated **immediate commercial intent** – mainly on actual procurement, contract, partnership sourcing

The era of Industrial AI transformation has arrived.
Now is the time to enter the next-generation AI-driven industrial ecosystem.

Be part of **Industrial AI EXPO 2026**,
the flagship business platform for
the Industrial AI ecosystem.



Industrial AI EXPO Organizing Committee

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