

Global AI Application-Specific Integrated Circuits Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global AI Application-Specific Integrated Circuits market size was valued at US\$ 37865 million in 2025 and is forecast to a readjusted size of US\$ 204715 million by 2032 with a CAGR of 22.9% during review period.

AI Application-Specific Integrated Circuits, or AI ASICs, refer to integrated circuits purpose-built to accelerate artificial intelligence workloads such as training, inference, recommendation, computer vision, speech processing, autonomous driving, robotics, edge perception and large-model serving. This research focuses on AI processors and accelerator devices whose architectures are deliberately optimized for tensor operations, matrix multiplication, low-precision arithmetic, on-chip memory, near-memory or in-memory computing, dataflow scheduling, chiplet interconnect, high-bandwidth memory and hardware-software co-design. The product scope includes cloud training ASICs, cloud inference ASICs, TPU-like processors, NPUs, LPUs, RDUs, IPUs, automotive AI SoCs, edge AI processors, and custom AI silicon or turnkey ASIC services for AI and HPC customers.

Indicative pricing varies widely: edge AI chips may range from several dollars to tens of dollars, automotive AI SoCs often fall in the tens-to-hundreds of dollars range, while data-center AI ASIC modules and high-end custom accelerators may reach several thousand to tens of thousands of dollars depending on process node, HBM configuration, packaging, module format and customer-specific design requirements.

Based on our research, the AI ASIC market should be understood as a specialised compute architecture market rather than a simple extension of conventional

semiconductor products. Its value proposition lies in reducing architectural redundancy and improving performance per watt, performance per dollar and workload-level efficiency for specific AI tasks. Compared with general-purpose GPUs, AI ASICs are designed around narrower but economically important workloads, including large-model inference, recommendation systems, computer vision, speech processing, autonomous driving and edge perception. For this reason, the report adopts a narrow professional scope: general-purpose GPUs, FPGAs, pure IP vendors, foundry-only suppliers and AI server integrators are excluded from the core market definition.

From the supply side, the global market is increasingly structured around three groups of participants. The first consists of hyperscalers such as Google, AWS, Meta and Microsoft, whose AI ASIC programmes are primarily aimed at lowering the long-term unit cost of internal AI infrastructure. The second consists of custom silicon and turnkey ASIC suppliers such as Broadcom, Marvell, GUC and Alchip, which capture value from advanced-node design, HBM integration, chiplet architecture and 2.5D/3D packaging complexity. The third group consists of specialist AI chip vendors such as Cerebras, Groq, SambaNova, d-Matrix, Hailo, Rebellions, FuriosaAI, Axelera, Horizon Robotics and Cambricon, each seeking differentiation in cloud inference, edge AI, automotive AI or domestic substitution.

From the demand side, the market is being driven by a shift from GPU-only scaling toward heterogeneous AI infrastructure combining GPUs, custom ASICs and workload-specific inference processors. The key growth factors include the rising cost of large-model inference, shortages of HBM and advanced packaging capacity, power and cooling constraints in AI data centres, and policy-driven demand for sovereign compute. At the same time, the sector remains exposed to several structural risks. Highly specialised chips can be vulnerable to rapid changes in model architecture, while weak software ecosystems can slow customer adoption. In practice, the winners are likely to be those that combine silicon efficiency, software maturity, supply-chain execution and credible access to advanced packaging capacity.

This report is a detailed and comprehensive analysis for global AI Application-Specific Integrated Circuits market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Function and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global AI Application-Specific Integrated Circuits market size and forecasts, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global AI Application-Specific Integrated Circuits market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global AI Application-Specific Integrated Circuits market size and forecasts, by Product Function and by Application, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global AI Application-Specific Integrated Circuits market shares of main players, shipments in revenue (\$ Million), sales quantity (K Pcs), and ASP (US\$/Pcs), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for AI Application-Specific Integrated Circuits

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global AI Application-Specific Integrated Circuits market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Broadcom Inc., Google LLC, Amazon Web Services, Marvell Technology, Huawei Technologies, Meta Platforms, Microsoft Corporation, Intel Corporation, Cambricon, Kunlunxin, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

AI Application-Specific Integrated Circuits market is split by Product Function and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Function, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Product Function

Training-oriented AI ASIC

Inference-oriented AI ASIC

Edge AI Processor

Automotive AI SoC

Market segment by Architecture Route

Tensor / Matrix Array ASIC

Dataflow AI Processor

In-memory / Near-memory AI ASIC

Other

Market segment by Packaging Class

HBM-based Advanced Package ASIC

GDDR / LPDDR-based ASIC

On-chip SRAM-centric ASIC

Standard Package Edge AI ASIC

Other

Market segment by Application

Large Model Training and Serving

Recommendation and Search Ranking

Intelligent Driving

Edge Vision and Robotics

Other

Major players covered

Broadcom Inc.

Google LLC

Amazon Web Services

Marvell Technology

Huawei Technologies

Meta Platforms

Microsoft Corporation

Intel Corporation

Cambricon

Kunlunxin

Enflame Technology

Cerebras Systems

Groq

SambaNova Systems

Horizon Robotics

Black Sesame Technologies

Hailo Technologies

Rebellions

FuriosaAI

d-Matrix

SiMa

Axelera AI

EdgeCortex

GUC

Alchip Technologies

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe AI Application-Specific Integrated Circuits product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of AI Application-Specific Integrated Circuits, with price, sales quantity, revenue, and global market share of AI Application-Specific Integrated Circuits from 2021 to 2026.

Chapter 3, the AI Application-Specific Integrated Circuits competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the AI Application-Specific Integrated Circuits breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Product Function and by Application, with sales market share and growth rate by Product Function, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and AI Application-Specific Integrated Circuits market forecast, by regions, by Product Function, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of AI Application-Specific Integrated Circuits.

Chapter 14 and 15, to describe AI Application-Specific Integrated Circuits sales channel, distributors, customers, research findings and conclusion.

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