

Global AI Application-Specific Integrated Circuits Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Application-Specific Integrated Circuits market size is expected to reach \$ 204715 million by 2032, rising at a market growth of 22.9% CAGR during the forecast period (2026-2032).

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, IPU, 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 studies the global AI Application-Specific Integrated Circuits production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AI Application-Specific Integrated Circuits and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AI Application-Specific Integrated Circuits that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AI Application-Specific Integrated Circuits total production and demand, 2021-2032, (K Pcs)

Global AI Application-Specific Integrated Circuits total production value, 2021-2032, (USD Million)

Global AI Application-Specific Integrated Circuits production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global AI Application-Specific Integrated Circuits consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: AI Application-Specific Integrated Circuits domestic production, consumption, key domestic manufacturers and share

Global AI Application-Specific Integrated Circuits production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global AI Application-Specific Integrated Circuits production by Product Function, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global AI Application-Specific Integrated Circuits production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global AI Application-Specific Integrated Circuits market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AI Application-Specific Integrated Circuits market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pcs) by manufacturer, by Product Function, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AI Application-Specific Integrated Circuits Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Application-Specific Integrated Circuits Market, Segmentation by Product Function:

Training-oriented AI ASIC

Inference-oriented AI ASIC

Edge AI Processor

Automotive AI SoC

Global AI Application-Specific Integrated Circuits Market, Segmentation by Architecture Route:

Tensor / Matrix Array ASIC

Dataflow AI Processor

In-memory / Near-memory AI ASIC

Other

Global AI Application-Specific Integrated Circuits Market, Segmentation by Packaging Class:

HBM-based Advanced Package ASIC

GDDR / LPDDR-based ASIC

On-chip SRAM-centric ASIC

Standard Package Edge AI ASIC

Other

Global AI Application-Specific Integrated Circuits Market, Segmentation by Application:

Large Model Training and Serving

Recommendation and Search Ranking

Intelligent Driving

Edge Vision and Robotics

Other

Companies Profiled:

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

Key Questions Answered:

1. How big is the global AI Application-Specific Integrated Circuits market?
2. What is the demand of the global AI Application-Specific Integrated Circuits market?
3. What is the year over year growth of the global AI Application-Specific Integrated Circuits market?
4. What is the production and production value of the global AI Application-Specific Integrated Circuits market?
5. Who are the key producers in the global AI Application-Specific Integrated Circuits market?
6. What are the growth factors driving the market demand?

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