

Global AI Audio and Video Chip Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G8BCD6C5CD4AEN.html>

Date: June 2026

Pages: 187

Price: US\$ 4,480.00 (Single User License)

ID: G8BCD6C5CD4AEN

Abstracts

The global AI Audio and Video Chip market size is expected to reach \$ 17203 million by 2032, rising at a market growth of 19.3% CAGR during the forecast period (2026-2032).

AI audio and video chips are a class of edge semiconductors that integrate sound capture and enhancement, voice front-end processing, image sensing, image signal processing, video encoding and decoding, neural network inference, and display or connectivity control. Their core role is to enable devices to hear, see, understand, and respond locally, thereby reducing the latency, bandwidth burden, privacy exposure, and power cost associated with cloud-dependent processing. Compared with traditional multimedia SoCs or standalone AI accelerators, these chips place greater emphasis on the tight convergence of audio, video, and AI capabilities. They are expected to support multi-microphone voice processing, noise reduction, wake-word detection, and local interaction, while also delivering ISP, HDR, video coding, object detection, segmentation, tracking, and event analytics. The technology is evolving toward on-sensor AI, AI-powered ISP, NPU acceleration, secure boot, and ultra-low-power always-on operation. In product form, the industry now spans a full hierarchy from ultra-low-power audio and vision MCUs, to NPUs embedded in MPUs and multimedia SoCs, and further to high-performance vision processors designed for intelligent cameras and large-scale video analytics. Typical applications include smart cameras, video conferencing, robotics, industrial vision, smart speakers, earbuds, mobile devices, intelligent displays, and in-vehicle systems. Key customers include security equipment vendors, consumer electronics brands, industrial equipment makers, automotive electronics suppliers, and IoT solution providers. Common delivery forms include standalone SoCs, NPUs embedded in MPUs or MCUs, vision chips with on-sensor AI, and supporting SDKs and toolchains. Commercially, revenue is still driven primarily by chip sales, while developer platforms, reference designs, and software ecosystems are increasingly used to

accelerate customer adoption and mass production.

The AI audio and video chip industry is evolving from traditional multimedia processors into edge intelligence computing platforms. What is driving this upgrade is not a single compute metric, but the deep convergence of audio, video, AI, and system security. In the past, many chips were only able to handle codec functions, display control, or basic voice interaction. Today, leading products integrate multi-microphone array processing, wake-word detection, image signal processing, video encoding and decoding, neural network inference, secure boot, toolchains, and developer platforms into a unified architecture, creating a far more integrated edge intelligence foundation. Sony's on-sensor AI approach, the intelligent camera vision processors from Ambarella and Hailo, the vision AI platforms from Renesas and TI for industrial and robotics use cases, and the multimedia AI platforms from MediaTek, Qualcomm, and Samsung for consumer devices all show that the core logic of this market has shifted from single-function chips to scenario-oriented system chips. Going forward, the vendors that can simultaneously build advantages in low power consumption, image quality, model deployment efficiency, and software ecosystem strength will be the ones most likely to win higher-value design slots.

From the demand side, this industry is no longer driven by a single consumer electronics replacement cycle. Instead, it is being pulled forward by multiple end markets in parallel. Smart cameras and security monitoring remain the most mature shipment segment because local video analytics, event recognition, intelligent search, and low-bandwidth transmission all carry clear commercial value. At the same time, smart speakers, earbuds, in-vehicle voice systems, human-machine interfaces, and conferencing terminals are continuously upgrading audio AI chips, transforming them from simple sound input-output components into interaction nodes capable of semantic understanding, sound optimization, speaker recognition, and even troubleshooting. More importantly, industrial vision, robotics, smart factories, and edge servers are becoming new sources of incremental demand. These customers tend to place greater value on stability, real-time responsiveness, low latency, and long-term supply continuity, and are therefore more willing to accept higher ASPs and longer validation cycles. In other words, the industry's growth base is shifting from a scale logic centered on consumer electronics to a more resilient model driven jointly by consumer, industrial, and infrastructure demand.

From a geographic and policy perspective, the supply side of AI audio and video chips has already formed a clear cross-regional structure. The main design strength is concentrated in the United States, Japan, South Korea, mainland China, Taiwan, and a

limited number of semiconductor-strong European countries, while demand is more strongly pulled by end brands, industrial equipment makers, and system integrators in Asia, North America, and Europe. As the EU AI Act progresses through implementation and the Cyber Resilience Act raises cybersecurity and updateability requirements for products with digital elements, on-device processing, privacy protection, secure design, and sustainable lifecycle management will gradually shift from differentiators to baseline entry requirements. For the industry, this is not necessarily a constraint. On the contrary, it may accelerate the clearing of weaker players, because higher compliance thresholds raise barriers to entry and push customers toward platform vendors with complete hardware, software, security, and ecosystem capabilities. Over the medium to long term, this is likely to transform AI audio and video chips from a fragmented component market into a high-growth platform market led by a smaller number of stronger companies while still leaving room for innovation in specialized niches.

This report studies the global AI Audio and Video Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AI Audio and Video Chip 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 Audio and Video Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AI Audio and Video Chip total production and demand, 2021-2032, (M Untis)

Global AI Audio and Video Chip total production value, 2021-2032, (USD Million)

Global AI Audio and Video Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (M Untis), (based on production site)

Global AI Audio and Video Chip consumption by region & country, CAGR, 2021-2032 & (M Untis)

U.S. VS China: AI Audio and Video Chip domestic production, consumption, key domestic manufacturers and share

Global AI Audio and Video Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (M Untis)

Global AI Audio and Video Chip production by Type, production, value, CAGR, 2021-2032, (USD Million) & (M Untis)

Global AI Audio and Video Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (M Untis)

This report profiles key players in the global AI Audio and Video Chip 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 Ambarella, Inc., Synaptics Incorporated, XMOS Ltd., NXP Semiconductors, Texas Instruments Incorporated, Hailo Technologies Ltd., Qualcomm, Intel, Infineon Technologies, STMicroelectronics, 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 Audio and Video Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (M Units) and average price (US\$/Unit) by manufacturer, by Type, 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 Audio and Video Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Audio and Video Chip Market, Segmentation by Type:

Audio Chip

Video Chip

Global AI Audio and Video Chip Market, Segmentation by Product Form:

Audio AI Chips

Video AI Chips

Integrated Audio-Video AI Chips

Global AI Audio and Video Chip Market, Segmentation by Application:

Consumer Electronics

Smart Appliances

Vehicle Electronics

Monitoring Equipment

Industrial Control

Others

Companies Profiled:

Ambarella, Inc.

Synaptics Incorporated

XMOS Ltd.

NXP Semiconductors

Texas Instruments Incorporated

Hailo Technologies Ltd.

Qualcomm

Intel

Infineon Technologies

STMicroelectronics

Amlogic

Sony Group Corporation

Renesas Electronics Corporation

Socionext Inc.

Samsung Electronics Co., Ltd.

DEEPX Co., Ltd.

Mobilint, Inc.

Telechips Inc.

MediaTek

Himax Technologies, Inc.

Novatek Microelectronics Corp.

Realtek Semiconductor Corp.

Rockchip

Allwinner Technology

Beijing Ingenic IC Co., Ltd.

Huawei Technologies Co., Ltd.

Key Questions Answered:

1. How big is the global AI Audio and Video Chip market?
2. What is the demand of the global AI Audio and Video Chip market?
3. What is the year over year growth of the global AI Audio and Video Chip market?
4. What is the production and production value of the global AI Audio and Video Chip market?
5. Who are the key producers in the global AI Audio and Video Chip market?
6. What are the growth factors driving the market demand?

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