

Global AI Chipset Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Chipset market size is expected to reach \$ 397631 million by 2032, rising at a market growth of 19.5% CAGR during the forecast period (2026-2032).

In 2025, global AI Chipset capacity reached 15,000 k Pcs, sales reached approximately 13,500 k Pcs, the average market price was around USD 7,850/Pcs, and the industry gross margin was 54%.

AI Chipsets have evolved from standalone accelerator components into system-level computing products. In cloud environments, GPU- or proprietary ASIC-based chipsets are integrated with high-speed interconnects, HBM subsystems, rack-scale power delivery and liquid-cooling infrastructure, enabling training and inference workloads to be deployed as standardized and repeatable ?AI factories.? In endpoint devices, AI Chipsets are increasingly integrated into SoCs, CPUs and heterogeneous computing platforms, with privacy protection, energy efficiency, latency and user experience becoming the primary dimensions of differentiation. The competitive landscape is concentrated across three major tracks: NVIDIA?s GPU-plus-full-stack system platform; AMD and Intel?s expansion in datacenter accelerators and open software ecosystems; and hyperscalers, including Google, AWS, Microsoft and Meta, scaling proprietary ASIC-based chipsets to secure supply, improve workload economics and strengthen infrastructure control. In edge and consumer-device markets, Apple and Qualcomm are positioning NPU-based AI Chipsets as core platform eligibility requirements.

The performance framework for AI Chipsets is shifting from isolated peak compute toward integrated efficiency across compute, memory, interconnect and power density. HBM capacity and bandwidth have become decisive variables in sustaining high-throughput large-model workloads. For example, the MI300X platform discloses 192GB

of HBM3 capacity and peak bandwidth of 5.3TB/s, while Gaudi 3 provides up to 128GB of HBM and 3.7TB/s of bandwidth, and TPU v5p publishes dedicated per-chip HBM capacity and bandwidth specifications. Low-precision computing and optimized kernels are becoming major incremental drivers for inference and reasoning workloads, with FP8 and FP4 increasingly positioned as core performance features. Rack-scale fabrics further improve realized throughput: NVL72 emphasizes a unified 72-GPU computing domain and approximately 130TB/s-class interconnect bandwidth, while Blackwell Ultra specifies NVLink 5 bandwidth per GPU and maximum supported topology. Power density and thermal management have also moved from datacenter infrastructure considerations into the effective specification of an AI Chipset. DGX B200-class systems disclose system-level power requirements and HBM3e bandwidth, while automotive and robotics platforms incorporate deterministic execution, functional isolation and safety architecture into the chipset design. NVIDIA Thor, for example, discloses INT8 TOPS, FP4 FLOPS and multiple power-envelope configurations.

Across the supply chain, AI Chipset competition is increasingly defined by system engineering capabilities. Upstream, leading-edge process nodes, advanced packaging technologies such as 2.5D and CoWoS-class integration, HBM availability, substrates and high-density interconnect components determine production ramp speed and effective shipment capacity. Midstream competition extends beyond processor silicon into multi-die integration, accelerator boards, servers, racks, networking systems and software platforms, including compilers, inference runtimes, communication libraries and collective-computing frameworks. These components jointly determine deployment speed, utilization rates and customer switching costs. Downstream, hyperscalers, internet platforms, automotive manufacturers, robotics companies and device OEMs translate application requirements into chipset specifications covering compute density, memory architecture, power envelopes, safety, latency and software compatibility. A representative development is the incorporation of rack-scale system capabilities into AI Chipset competitiveness. AMD has completed its acquisition of ZT Systems, combining CPU, GPU, networking and rack-scale systems expertise into a more integrated delivery platform aligned with the procurement and deployment models of hyperscale customers.

Growth is expanding along three major directions. First, datacenter AI Chipsets are moving from a single-accelerator competition toward an AI-factory competition, with cloud providers increasingly disclosing rack- and cluster-scale deployment configurations. OCI has introduced liquid-cooled GB200 NVL72 infrastructure for very large-scale clusters, while SK Group and NVIDIA have announced an AI factory exceeding 50,000 GPUs, targeting manufacturing, digital twins, industrial AI and agent-

based applications. The commercial unit is consequently shifting from individual accelerators toward integrated chipset platforms, compute trays, racks and complete clusters.

Second, geopolitics, export controls and compliance requirements are becoming embedded in AI Chipset product roadmaps. The introduction and subsequent rescission of the U.S. AI diffusion framework, together with continuing restrictions and guidance related to advanced computing integrated circuits, are driving more granular supply planning, regional product configurations, performance-tiered SKUs and shipment-control mechanisms. AI Chipset suppliers are increasingly required to coordinate architecture, performance positioning, packaging, country-specific availability and customer qualification within a unified product strategy.

Third, on-device AI Chipsets are becoming mandatory platform gates. Microsoft has incorporated a 40+ TOPS NPU threshold into Copilot+ PC requirements, directly linking operating-system features to local AI processing capability. Apple discloses a 38 TOPS Neural Engine for the M4 platform and integrates on-device generative AI functions with its broader hardware and software experience. In automotive applications, centralized computing chipsets such as Thor support the convergence of digital cockpit, advanced driver assistance, autonomous-driving workloads and safety-domain processing. In robotics and industrial edge systems, AI Chipsets are expanding from computer vision acceleration into multimodal perception, decision-making, motion planning and real-time control.

Over the next 12-24 months, the most commercially bankable trend will not be limited to larger models, but will center on more inference workloads, stronger system integration and deeper vertical specialization. FP4 and FP8 inference, memory-access optimization and communication efficiency will become the principal battlegrounds for improving output per watt. HBM and advanced packaging capacity will remain critical supply-side constraints. Sovereign and industry-specific AI factories will expand procurement from AI Chipsets to accelerator boards, servers, racks, power systems, liquid-cooling infrastructure, networking and operations software. Robotics, autonomous systems and industrial edge applications will create a second growth curve by extending AI Chipset demand from visual processing to multimodal, deterministic and real-time control workloads.

This report studies the global AI Chipset production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global AI Chipset total production and demand, 2021-2032, (K Pcs)

Global AI Chipset total production value, 2021-2032, (USD Million)

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

Global AI Chipset consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: AI Chipset domestic production, consumption, key domestic manufacturers and share

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

Global AI Chipset production by Technical Architecture, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

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

This report profiles key players in the global AI Chipset 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 NVIDIA, AMD, Intel, Google, Microsoft, Amazon, Samsung, Qualcomm, IBM, Apple, 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 Chipset 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 Technical Architecture, 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 Chipset Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Chipset Market, Segmentation by Technical Architecture:

GPU

FPGA

ASIC

Others

Global AI Chipset Market, Segmentation by Function:

Training Chip

Inference Chip

Global AI Chipset Market, Segmentation by Industry:

Data Center

Automobile

Robot

Consumer Electronics

Medical

Others

Global AI Chipset Market, Segmentation by Application:

Cloud Server

Edge and Terminal (Mobile Device)

Companies Profiled:

NVIDIA

AMD

Intel

Google

Microsoft

Amazon

Samsung

Qualcomm

IBM

Apple

Meta

Cerebras Systems

Groq

Graphcore

Tenstorrent

Hailo

SambaNova

Huawei

Cambricon

Horizon Robotics

Biren

Iluvatar CoreX

Moore Threads

MetaX

Enflame

Hygon Information Technology

Changsha Jingjia Microelectronics

Kunlunxin (Baidu)

T-Head (Alibaba)

Hexaflake

Key Questions Answered:

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

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