

Global AI Compute Core IP 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 Compute Core IP market size was valued at US\$ 230 million in 2025 and is forecast to a readjusted size of US\$ 618 million by 2032 with a CAGR of 14.8% during review period.

AI Compute Core IP, also referred to as NPU IP and AI Accelerator IP, denotes licensable semiconductor compute cores designed to execute artificial intelligence inference, machine learning workloads, neural network operations, computer vision, speech processing, sensor fusion, transformer models, edge large language models and multimodal AI workloads within SoCs, MCUs, ASICs and application-specific processors. These products are typically delivered as RTL soft IP, configurable processor IP, neural processing units, AI accelerator subsystems, AI-capable DSPs, vector or matrix processor cores, neural network accelerators, embedded GPGPU / NNA cores or reconfigurable eFPGA-based acceleration blocks. A commercially usable AI compute core IP offering normally includes not only hardware logic but also compilers, SDKs, model conversion tools, performance estimators, simulators, runtime libraries and integration documentation. Key technical parameters include MAC array scale, TOPS, TOPS/W, supported precisions such as INT8, INT4, FP16 and BF16, on-chip memory hierarchy, sparsity support, compression, AXI or NoC connectivity, functional safety readiness and software ecosystem maturity.

Pricing is highly project-specific: low-power edge NPU IP for MCU and AIoT applications may be licensed in the hundreds-of-thousands-of-dollars range, while high-performance automotive or data-centre inference accelerator IP may command multi-million-dollar upfront license fees plus royalties.

Based on our research, the AI Compute Core IP market should not be treated as a direct subset of the broader AI chip or accelerator card market. Its economic substance lies in licensable semiconductor compute cores that allow SoC designers, MCU vendors, automotive semiconductor companies, ASIC developers and edge device chipmakers to integrate AI inference capability without building a neural processing architecture from scratch. Under this narrow scope, the market is considerably smaller than the global GPU, AI accelerator card or AI server market, but it is strategically important because it controls a core layer of edge intelligence. Commercial offerings usually combine RTL hardware, compilers, SDKs, model conversion tools, runtime software and integration support. The market is increasingly shifting from conventional CNN and computer-vision acceleration towards transformer inference, lightweight LLMs, multimodal models, sparsity, mixed precision and local generative AI execution.

From a supply-side perspective, the industry is structured around several layers rather than a single dominant platform. Large IP and EDA-linked suppliers such as Arm, Synopsys, Cadence, CEVA, VeriSilicon and Imagination benefit from established licensing relationships, broad SoC customer bases and mature software ecosystems. Dedicated NPU IP companies such as Expedera, Quadric, OPENEDGES, aiMotive, EdgeCortex and BrainChip compete through specialised architectures, automotive safety positioning, low-power edge AI, programmable inference engines or neuromorphic design. RISC-V IP suppliers such as SiFive, Andes and MIPS are entering the AI compute core discussion through vector, matrix and workload-specific extensions, while eFPGA providers such as Achronix, Menta and Flex Logix form an adjacent reconfigurable acceleration layer. This makes the competitive structure more fragmented and engineering-driven than the data-centre GPU market.

Demand growth is primarily driven by local inference requirements across edge AI, AIoT, smart cameras, automotive ADAS, robotics, industrial vision, AI PCs and consumer electronics. In automotive, deterministic latency, functional safety and long product lifecycles are critical; in consumer and IoT applications, area, power and cost efficiency are more important; in AI PC and edge generative AI, the ability to support transformer and language-model workloads is becoming a key differentiator. The increasing cost and complexity of advanced-node chip design support the adoption of pre-validated AI compute IP, particularly where customers require shorter time-to-market and a proven software stack.

Industry dynamics also indicate a closer convergence between AI compute, EDA, semiconductor IP, interconnect and system-level design. Synopsys' acquisition of

Ansyz strengthens its silicon-to-systems design position; GlobalFoundries' acquisition of MIPS illustrates the strategic value of combining process technology with processor and AI IP; Qualcomm's acquisition of Alphawave Semi highlights the growing importance of connectivity and custom compute platforms in AI infrastructure. These developments suggest that future competition will not be determined by peak TOPS alone. Instead, the decisive factors will include real model throughput, TOPS/W, memory efficiency, compiler maturity, ecosystem depth, functional safety readiness and the ability to support customers from architecture exploration through silicon validation.

This report is a detailed and comprehensive analysis for global AI Compute Core IP market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Core Architecture 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 Compute Core IP market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global AI Compute Core IP market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global AI Compute Core IP market size and forecasts, by Core Architecture and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global AI Compute Core IP market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 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 Compute Core IP

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 Compute Core IP 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 Arm Holdings plc, Synopsys, Inc., Cadence Design Systems, Inc., CEVA, Inc., VeriSilicon Microelectronics, Imagination Technologies, Expedera Inc., Quadric.io, OPENEDGES Technology, aiMotive Ltd., etc.

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

Market Segmentation

AI Compute Core IP market is split by Core Architecture and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Core Architecture, 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 Core Architecture

Dedicated NPU Core

AI-capable DSP / Vector Core

GPU / GPGPU / NNA Core

Reconfigurable AI Core

Other

Market segment by Performance Class

Tiny / Always-on AI Core

Edge NPU Core

Automotive / Industrial High-reliability Core

High-performance AI Accelerator Core

Other

Market segment by Software Stack Integration

Hardware IP Only

IP with Compiler / SDK

Full AI Subsystem IP

Safety-certified AI IP Stack

Market segment by Model Support

INT8 / INT16 Classical Inference Core

Mixed-precision AI Core

Transformer-ready AI Core

Other

Market segment by Application

AI PC and Edge Computing

Consumer Electronics and AIoT

Automotive and Mobility

Industrial and Robotics

Other

Major players covered

Arm Holdings plc

Synopsys, Inc.

Cadence Design Systems, Inc.

CEVA, Inc.

VeriSilicon Microelectronics

Imagination Technologies

Expedera Inc.

Quadric.io

OPENEDGES Technology

aiMotive Ltd.

EdgeCortex Inc.

SiFive, Inc.

Andes Technology Corporation

MIPS

BrainChip Holdings

Digital Media Professionals

Achronix Semiconductor

Menta S.A.S.

Think Silicon

Analog Devices

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 Compute Core IP product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of AI Compute Core IP, with price, sales quantity, revenue, and global market share of AI Compute Core IP from 2021 to 2026.

Chapter 3, the AI Compute Core IP competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the AI Compute Core IP 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 Core Architecture and by Application, with sales market share and growth rate by Core Architecture, 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 Compute Core IP market forecast, by regions, by Core Architecture, 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 Compute Core IP.

Chapter 14 and 15, to describe AI Compute Core IP sales channel, distributors, customers, research findings and conclusion.

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