

Global AI PC NPU Chip 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 PC NPU Chip market size was valued at US\$ 989 million in 2025 and is forecast to a readjusted size of US\$ 2994 million by 2032 with a CAGR of 17.0% during review period.

An AI PC NPU chip is a dedicated Neural Processing Unit integrated into PC processors or SoCs, designed to accelerate on-device AI inference workloads such as large language model inference, image generation, speech recognition, and video enhancement. In 2025, global AI PC NPU chip production reached approximately 75.18 M Units. Upstream includes EDA tools, semiconductor IP (CPU/GPU/NPU cores), advanced process wafer fabrication (5nm/3nm nodes), and advanced packaging/testing technologies, all of which determine compute density and power efficiency.

The AI PC NPU chip market refers to the neural processing units integrated into PC SoCs, designed to accelerate on-device AI inference workloads such as large language models, image generation, speech recognition, and intelligent system optimization. Driven by the shift of AI from cloud to edge devices, the personal computer is evolving from a traditional general-purpose computing device into an AI-native computing terminal. In this transformation, the NPU emerges as a third core compute engine alongside CPU and GPU. Compared to GPUs, NPUs offer significantly higher power efficiency for matrix-intensive workloads, making them a critical component of AI PC architectures.

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

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

Global AI PC NPU Chip market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global AI PC NPU Chip market shares of main players, shipments in revenue (\$ Million), sales quantity (Million 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 PC NPU Chip

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 PC NPU Chip 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 Intel, AMD, Apple, Qualcomm, MediaTek, etc.

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

Market Segmentation

AI PC NPU Chip market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, 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 Type

Integrated NPU

Discrete AI NPU

Market segment by Architecture

x86 Platform NPU

ARM PC NPU

GPU Collaborative AI Architecture

Market segment by Compute Capability

Low-end NPU (40 TOPS)

Market segment by PC Application

AI Laptop PCs

AI Desktop PCs

Commercial/Enterprise AI PC

Gaming AI PC

Market segment by Application

Local Large Model Inference

Image/Video Generation

Speech Recognition/Translation

AI Office Assistant

Others

Major players covered

Intel

AMD

Apple

Qualcomm

MediaTek

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 PC NPU Chip product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of AI PC NPU Chip, with price, sales quantity, revenue, and global market share of AI PC NPU Chip from 2021 to 2026.

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

Chapter 4, the AI PC NPU Chip 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 Type and by Application, with sales market share and growth rate by Type, 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 PC NPU Chip market forecast, by regions, by Type, 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 PC NPU Chip.

Chapter 14 and 15, to describe AI PC NPU Chip sales channel, distributors, customers, research findings and conclusion.

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