

Global AI PC NPU Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI PC NPU Chip market size is expected to reach \$ 2994 million by 2032, rising at a market growth of 17.0% CAGR during the forecast period (2026-2032).

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 studies the global AI PC NPU Chip production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global AI PC NPU Chip total production and demand, 2021-2032, (Million Units)

Global AI PC NPU Chip total production value, 2021-2032, (USD Million)

Global AI PC NPU Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global AI PC NPU Chip consumption by region & country, CAGR, 2021-2032 & (Million Units)

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

Global AI PC NPU Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global AI PC NPU Chip production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global AI PC NPU Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global AI PC NPU 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 Intel, AMD, Apple, Qualcomm, MediaTek, 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 PC NPU Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million 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 PC NPU Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI PC NPU Chip Market, Segmentation by Type:

Integrated NPU

Discrete AI NPU

Global AI PC NPU Chip Market, Segmentation by Architecture:

x86 Platform NPU

ARM PC NPU

GPU Collaborative AI Architecture

Global AI PC NPU Chip Market, Segmentation by Compute Capability:

Low-end NPU (40 TOPS)

Global AI PC NPU Chip Market, Segmentation by PC Application:

AI Laptop PCs

AI Desktop PCs

Commercial/Enterprise AI PC

Gaming AI PC

Global AI PC NPU Chip Market, Segmentation by Application:

Local Large Model Inference

Image/Video Generation

Speech Recognition/Translation

AI Office Assistant

Others

Companies Profiled:

Intel

AMD

Apple

Qualcomm

MediaTek

Key Questions Answered:

1. How big is the global AI PC NPU Chip market?

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

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