

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

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Abstracts

The global AI SoC market size is expected to reach \$ 1563 million by 2032, rising at a market growth of 20.3% CAGR during the forecast period (2026-2032).

This report defines AI SoC chips as follows: Chips that integrate general-purpose processing cores (such as Arm CPUs, RISC-V CPUs, etc.) and dedicated artificial intelligence computing units (such as NPUs, AI GPUs, AI DSPs, etc.) on a single SoC chip, enabling them to perform deep learning and other AI inference computations locally on the terminal device, and providing AI perception, recognition, and decision-making capabilities.

Compared to general-purpose SoCs, AI SoCs are specifically optimized for neural network inference at the chip architecture level, and are typically marketed based on 'computing power (TOPS),' 'supported AI model types,' and 'typical application scenarios' (such as autonomous driving, security cameras, smart speakers, wearable devices, edge servers, etc.).

As the core hardware and 'brain' of smart devices, AI SoC's core value lies in integrating NPU units and realizing collaborative optimization of algorithms and chips. It provides core computing power for devices, enabling edge AI functions such as speech recognition, image processing, and real-time decision-making. Directly determining the performance boundaries, energy efficiency levels, and interactive experiences of smart devices, AI SoC serves as a key engine driving the iterative evolution of smart devices. From the perspective of market growth drivers, AI algorithm innovations represented by large models have become the core impetus. The rise of generative AI has accelerated the migration of AI inference models to the edge side, promoting the evolution of models towards lightweight, high-efficiency, and customized solutions. Meanwhile, the explosive demand for real-time inference and privacy protection in low-power scenarios among terminal devices has made AI SoC the core carrier to meet this demand, directly driving the rapid expansion of market scale. Compared with traditional SoCs, AI SoCs have

advantages in balancing the operational efficiency of complex algorithms and power consumption, making them an indispensable component for the intelligent upgrading of smart devices.

In downstream application fields, AI SoC presents the characteristics of multi-scenario penetration and differentiated development:

1. In the smart home scenario, device forms continue to enrich?expanding from traditional categories such as smart TVs, set-top boxes, and IP cameras to home service robots (sweeping, lawn-mowing, companion robots, etc.) and smart home appliances. Technologies such as 5G and Wi-Fi 7 have laid a solid foundation for connectivity, while AI empowers devices with automatic collaboration and personalized experiences.
2. In the commercial and education sector, enterprise digital transformation and industry-wide intelligent demands have spawned diverse applications. Smart conference systems, payment devices, fitness equipment, advertising terminals, and other devices all require AI SoC to provide computing power support. Scenario-specific customization has become a trend?for example, security-oriented devices focus on image and video analysis capabilities, while conference devices emphasize audio processing and natural language understanding, driving sustained high growth of AI SoC in this field.
3. The automotive sector is an important growth pole for AI SoC. Amid the trends of electrification, connectivity, and intelligence in smart cars, smart cockpits (multi-screen interaction, AR navigation, voice assistants) and advanced driver assistance systems (ADAS) have an urgent demand for AI SoCs with high computing power, low latency, and high integration. The in-depth application of AI technology in scenarios such as power optimization and safety protection has further amplified market demand.
4. In the personal mobile device field, product forms have expanded from smartphones and wearable devices to innovative categories such as XR devices and AI glasses. Edge AI requires devices to possess local data processing and offline working capabilities, prompting AI SoCs to evolve towards higher heterogeneous computing capabilities and better energy efficiency ratios. Among these, AI SoCs related to smart wearable devices have shown particularly prominent growth.

From the perspective of development trends, the AI SoC market is presenting three core directions: first, the in-depth integration of AI and edge computing?local processing of AI tasks on terminal devices has become the norm, forcing chips to seek a better balance between computing power enhancement and power consumption control; second, the parallel development of customization and high integration?manufacturers need to optimize AI accelerators, interfaces, and power management units according to the segmented needs of different application scenarios, providing integrated hardware and software solutions; third, the growing importance of ecological collaboration?linkages between operators, smart device brands, and SoC

manufacturers have deepened, and a global marketing, sales, and service network has become a key competitive advantage for manufacturers.

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

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

Highlights and key features of the study

Global AI SoC total production and demand, 2021-2032, (Million Units)

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

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

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

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

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

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

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

This report profiles key players in the global AI SoC 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 Mobileye, Ambarella, Hisilicon, Rockchip Electronics, Aispeech, SigmaStar Technology Ltd, Eeasy Tech, SENSLAB, Shanghai Fullhan Microelectronics, Ingenic Semiconductor, 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 SoC 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 SoC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI SoC Market, Segmentation by Type:

Low TOPS

Medium TOPS

High TOPS

Ultra-high TOPS

Global AI SoC Market, Segmentation by Application:

Security

Automotive ADAS/Autonomous Driving

Consumer Electronics

General Edge/Industrial Control AI

Others

Companies Profiled:

Mobileye

Ambarella

Hisilicon

Rockchip Electronics

Aispeech

SigmaStar Technology Ltd

Eeasy Tech

SENSLAB

Shanghai Fullhan Microelectronics

Ingenic Semiconductor

Shanghai Artosyn

Rebellions Inc

OCE Technology

SEMIFIVE

Atlazo

Anyka Microelectronics

Horizon Robotics

Black Sesame Technologies

Kneron

Shanghai Axera Semiconductor Technology

Allwinner Technology

Texas Instruments

Qualcomm

Renesas Electronics

iCatch Technology

NXP Semiconductors

Nextchip

Key Questions Answered:

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

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