

Global AI Tensor/Matrix Compute Core 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 Tensor/Matrix Compute Core market size was valued at US\$ 95487 million in 2025 and is forecast to a readjusted size of US\$ 374808 million by 2032 with a CAGR of 18.4% during review period.

An AI Tensor/Matrix Compute Core refers to a dedicated hardware compute block embedded in GPUs, NPUs, AI ASICs, SoCs, edge AI processors, or licensable semiconductor IP, designed to accelerate tensor and matrix-intensive workloads in deep learning, generative AI, recommendation systems, computer vision, and edge intelligence. It typically appears as a tensor engine, matrix core, MAC array, systolic array, Cube Unit, NeuronCore, NPU core, reconfigurable dataflow unit, or AI accelerator core. Its primary function is to execute matrix multiplication, convolution, fused multiply-add, attention-related operations, quantised inference, low-precision floating-point computation, sparse computation, and selected data movement tasks. Key technical parameters include supported data formats such as FP32, TF32, FP16, BF16, FP8, FP6, FP4, INT8 and INT4, MAC throughput, on-chip SRAM or buffer structure, memory-bandwidth coupling, compiler programmability, sparsity support, power efficiency, and multi-chip scalability.

Where sold as semiconductor IP, the commercial value is reflected in licence fees, engineering service fees and royalties; where embedded in AI accelerators, its value is attributed to the compute portion of the chip or module ASP. This report focuses on the hardware compute-core and chip/IP-level attributable value rather than complete AI servers, cloud service revenue, or data-centre infrastructure.

According to our research, the AI tensor/matrix compute core should not be treated as a standalone commodity component or as a synonym for NVIDIA Tensor Core alone. It is a specialised compute block embedded inside GPUs, NPUs, AI ASICs, SoCs and licensable semiconductor IP, designed to accelerate matrix multiplication, convolution, attention-related computation and low-precision multiply-accumulate operations. Its economic value is usually captured through the surrounding chip, accelerator card, custom ASIC, SoC or IP licensing model rather than through a separately traded component market. For this reason, the most appropriate statistical boundary is a chip/IP-level attributable-value approach. A broad definition would incorrectly merge this topic with AI servers, cloud services or data-centre infrastructure, while an excessively narrow definition would understate the market by treating it as a vendor-specific GPU feature.

From a supply perspective, the global competitive structure is led by the United States, where NVIDIA, AMD, Intel, Google, AWS, Microsoft, Broadcom, Meta, Qualcomm, Apple, Cerebras, Groq, SambaNova and Tenstorrent represent different branches of the AI compute-core ecosystem. NVIDIA remains the clear leader in merchant data-centre AI accelerators, while AMD and Intel compete through matrix-core GPU and accelerator architectures. Google, AWS, Microsoft and Meta represent the hyperscaler custom-silicon route, supported in part by suppliers such as Broadcom. Arm, Synopsys, Cadence and CEVA occupy a distinct IP-licensing layer, enabling SoC vendors to embed NPU or AI compute cores into mobile, automotive, IoT and industrial products. China is developing a parallel domestic supply base led by Huawei Ascend, Cambricon, Moore Threads, Biren, Enflame, Iluvatar CoreX, MetaX, Kunlunxin and Alibaba T-Head, although the maturity of software ecosystems and high-volume deployment varies materially by vendor.

Demand is being driven primarily by large-scale AI training, high-throughput inference, long-context model serving, recommender-system acceleration and cloud providers' efforts to control compute costs through custom silicon. Edge AI, AI PCs, smartphones, intelligent vehicles, robotics and industrial vision also create substantial unit demand for NPU cores, but their attributable value per chip is much lower than that of data-centre accelerators. Therefore, market sizing should not be based solely on unit shipments or TOPS claims. A more robust model needs to consider precision support, usable model throughput, memory bandwidth, on-chip storage, compiler maturity, ecosystem compatibility and deployment scale. The migration from FP16/BF16 toward FP8, FP6, FP4 and INT4 is raising the strategic importance of specialised tensor and matrix datapaths.

Looking ahead, competition will increasingly move from raw peak performance toward full-stack efficiency. NVIDIA's advantage lies in the combination of tensor-core architecture, CUDA software depth and system-level deployment capability. AMD, Intel and emerging GPU suppliers will compete through memory capacity, open software stacks and price-performance positioning. Hyperscalers will continue to increase their use of custom ASICs where workload predictability and deployment scale justify dedicated silicon. Meanwhile, edge AI suppliers will pursue lower-power architectures for vision, robotics, industrial automation and on-device multimodal inference. The most important risks are partial substitution by custom AI ASICs, commoditisation of simple MAC-array IP, and rapid shifts in model architecture that can make fixed-function accelerators less attractive unless supported by strong compiler and software ecosystems.

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

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

Global AI Tensor/Matrix Compute Core 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:

Global AI Tensor/Matrix Compute Core Market 2026 by Manufacturers, Regions, Type and Application, Forecast to...

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for AI Tensor/Matrix Compute Core

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 Tensor/Matrix Compute Core 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 NVIDIA Corporation, Broadcom Inc., Google LLC, AMD, Amazon Web Services, Huawei Technologies, Microsoft, Intel, Qualcomm, Apple, etc.

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

Market Segmentation

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

GPU Tensor / Matrix Core

NPU / Neural Compute Core

Custom AI ASIC Tensor Engine

Other

Market segment by Commercialization Model

Merchant Accelerator Chip

Captive Hyperscaler ASIC

Licensable Semiconductor IP

Embedded SoC Core

Market segment by Precision Support

FP32 / TF32 / FP16 / BF16 Core

FP8 / FP6 / FP4 Core

INT8 / INT4 Quantized Core

Mixed-Precision Core

Other

Market segment by Application

Data Center Training

Data Center Inference

Edge AI and Industrial Vision

Automotive and On-device AI

Other

Major players covered

NVIDIA Corporation

Broadcom Inc.

Google LLC

AMD

Amazon Web Services

Huawei Technologies

Microsoft

Intel

Qualcomm

Apple

Meta Platforms

Arm Holdings

Synopsys

Cadence

CEVA

Cerebras

Groq

SambaNova

Tenstorrent

Cambricon

Moore Threads

Biren Technology

Enflame

Iluvatar CoreX

FuriosaAI

Hailo

Axelera AI

SiMa

IBM

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 Tensor/Matrix Compute Core product scope, market overview, market estimation caveats and base year.

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

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

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

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