

Global AI Tensor/Matrix Compute Core Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Tensor/Matrix Compute Core market size is expected to reach \$ 374808 million by 2032, rising at a market growth of 18.4% CAGR during the forecast period (2026-2032).

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 studies the global AI Tensor/Matrix Compute Core production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global AI Tensor/Matrix Compute Core total production and demand, 2021-2032, (K Units)

Global AI Tensor/Matrix Compute Core total production value, 2021-2032, (USD Million)

Global AI Tensor/Matrix Compute Core production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global AI Tensor/Matrix Compute Core consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: AI Tensor/Matrix Compute Core domestic production, consumption, key domestic manufacturers and share

Global AI Tensor/Matrix Compute Core production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global AI Tensor/Matrix Compute Core production by Core Architecture Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global AI Tensor/Matrix Compute Core production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global AI Tensor/Matrix Compute Core 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AI Tensor/Matrix Compute Core market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Core Architecture 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 Tensor/Matrix Compute Core Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Tensor/Matrix Compute Core Market, Segmentation by Core Architecture

Global AI Tensor/Matrix Compute Core Supply, Demand and Key Producers, 2026-2032

Type:

GPU Tensor / Matrix Core

NPU / Neural Compute Core

Custom AI ASIC Tensor Engine

Other

Global AI Tensor/Matrix Compute Core Market, Segmentation by Commercialization Model:

Merchant Accelerator Chip

Captive Hyperscaler ASIC

Licensable Semiconductor IP

Embedded SoC Core

Global AI Tensor/Matrix Compute Core Market, Segmentation by Precision Support:

FP32 / TF32 / FP16 / BF16 Core

FP8 / FP6 / FP4 Core

INT8 / INT4 Quantized Core

Mixed-Precision Core

Other

Global AI Tensor/Matrix Compute Core Market, Segmentation by Application:

Data Center Training

Data Center Inference

Edge AI and Industrial Vision

Automotive and On-device AI

Other

Companies Profiled:

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

Key Questions Answered:

1. How big is the global AI Tensor/Matrix Compute Core market?
2. What is the demand of the global AI Tensor/Matrix Compute Core market?
3. What is the year over year growth of the global AI Tensor/Matrix Compute Core market?

4. What is the production and production value of the global AI Tensor/Matrix Compute Core market?
5. Who are the key producers in the global AI Tensor/Matrix Compute Core market?
6. What are the growth factors driving the market demand?

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