

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

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Abstracts

The global AI Vision Chip market size is expected to reach \$ 35238 million by 2032, rising at a market growth of 15.2% CAGR during the forecast period (2026-2032).

AI vision chips are, at their core, semiconductor devices designed to perform computations such as image acquisition, image preprocessing, feature extraction, object detection/segmentation/recognition, and temporal video analysis as much as possible at the edge. Typical device forms include:

Vision SoC: Integrates ISP + codec + NPU, suitable for IPC, smart cameras, robots, and automotive vision

Vision NPU / AI Accelerator: External accelerators responsible for CNN, Transformer, and multimodal lightweight inference

Automotive Vision SoC: Emphasizes functional safety, low latency, multi-camera input, and automotive-grade certification

Intelligent Vision Sensor: Performs AI preprocessing and recognition directly within the image sensor

Global sales of AI vision chips are projected to reach 947.44 million units in 2025, with an average price of \$13.26 per unit.

Development Trends

Evolving from ?image processing chips? to ?vision understanding chips?

The industry has evolved from traditional ISP + codec + basic CV to detection, segmentation, tracking, behavior understanding, lightweight inference, and even edge-side GenAI/reasoning. Ambarella's consecutive releases of edge GenAI and CV7 solutions in 2025-2026 have positioned 'multi-channel video + local inference + low power consumption' as core selling points; Synaptics also launched multimodal GenAI processors for IoT edge in 2025. This indicates that AI vision chips are shifting from merely 'seeing' to 'understanding + inferring'.

Product Form Factors Extend from SoCs to 'AI-Integrated Sensors'

Sony's IMX500 has directly integrated AI processing capabilities into smart vision sensors, with the official goal of simplifying the entire edge AI process from development to deployment. This represents a clear direction: AI does not necessarily have to run solely on the main SoC; some pre-processing, recognition, and even result filtering will be shifted to the sensor side, thereby reducing bandwidth, power consumption, and system BOM.

Multimodal and multi-sensor fusion become standard features in high-end products

The new generation of vision chips is no longer limited to a single camera or a single model; instead, they emphasize multi-stream video, multi-sensor perception, and the fusion of vision with audio, radar, and IMU. Ambarella's CV7 explicitly focuses on multi-video streams and multi-sensor perception; automotive platforms like Mobileye's EyeQ have already positioned visual computing within the continuum from ADAS to advanced autonomous driving, emphasizing scalability, low power consumption, and real-time responsiveness.

Automotive, industrial, and robotics have become the three fastest-growing application sectors.

Mobileye clearly positions EyeQ for automotive-grade vision computing spanning ADAS to full autonomy; NXP also clearly outlines its key edge AI applications: industrial robotics and intelligent vehicles. Meanwhile, IFR data shows that 401,665 new industrial robots installed in global factories in 2024 were located in Asia, with Asia accounting for 74% of global new installations and the top five markets accounting for 80% of the global total. This indicates that robotics and automation are continuing to drive demand for local visual computing power.

This report studies the global AI Vision Chip production, demand, key manufacturers,

and key regions.

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global AI Vision 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 Qualcomm^{US}, NVIDIA^{US}, Horizon Robotics^{CN}, Sony Semiconductor Solutions^{JP}, NXP Semiconductors^{NL}, Renesas Electronics^{JP}, Ambarella^{US}, Rockchip Electronics^{CN}, AMD^{US}, onsemi^{US}, 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 Vision 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 Vision Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Vision Chip Market, Segmentation by Type:

Low computing power (10 TOPS)

Global AI Vision Chip Market, Segmentation by Technical Architecture:

Direct Sales

Distribution

Global AI Vision Chip Market, Segmentation by Sales Channels:

Global AI Vision Chip Market, Segmentation by Application:

Automotive ADAS / Autonomous Driving

Smart Security / IPC

Industrial Machine Vision

Robotics / Drones / AMR

Retail / Logistics / Smart Cities

Consumer Visual Devices

Medical / Professional Equipment

Other

Companies Profiled:

Qualcomm?US?

NVIDIA?US?

Horizon Robotics?CN?

Sony Semiconductor Solutions?JP?

NXP Semiconductors?NL?

Renesas Electronics?JP?

Ambarella?US?

Rockchip Electronics?CN?

AMD?US?

onsemi?US?

Synaptics?US?

SigmaStar?CN?

Texas Instruments?US?

STMicroelectronics?NL?

Axera Semiconductor?CN?

Socionext?JP?

Axelera AI?NL?

Black Sesame International Holding Limited?CN?

Key Questions Answered:

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

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