

Global Embodied AI Chip 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 Embodied AI Chip market size was valued at US\$ 247 million in 2025 and is forecast to a readjusted size of US\$ 3185 million by 2032 with a CAGR of 43.9% during review period.

An Embodied AI Chip is a core computing semiconductor designed for intelligent systems that perceive physical environments, perform autonomous reasoning and execute actions through robotic bodies. It is primarily deployed in humanoid robots, industrial and collaborative robots, autonomous mobile robots, service robots and medical robots. Core workloads include multimodal perception, vision-language and vision-language-action model inference, localization and mapping, task planning, sensor fusion, motion control and safety-related decision-making.

Typical products employ heterogeneous architectures integrating CPUs, GPUs, NPUs or dedicated AI accelerators, DSPs, real-time processors and safety islands. The market scope covers central robot processors, integrated brain-and-cerebellum processors, AI perception processors and dedicated inference accelerators. It excludes ordinary control MCUs, memories, connectivity ICs, sensor ICs, power-management ICs and motor-driver ICs. The value of complete controllers, development boards and general-purpose server GPUs is also excluded unless converted into a processor-equivalent value attributable to robotic deployment.

In 2025, the global shipment of Embodied AI Chip is expected to reach approximately 800,000 units, with a price of approximately US\$300 per chip and a gross margin of approximately 40% to 60%.

Embodied AI chips are evolving from conventional robot vision processors and motion controllers into heterogeneous computing platforms capable of supporting perception, cognition, decision-making and control. Vision-language models, vision-language-action models and world models are moving from cloud-based training toward on-device inference. Robots therefore need to process multiple cameras, LiDAR, voice, force and tactile inputs within constrained power envelopes while completing planning and motion loops within milliseconds. Commercial expansion of humanoid robots, logistics AMRs, collaborative robots and intelligent service robots is increasing the value of high-performance NPUs, real-time CPUs, safety islands and high-speed sensor interfaces.

The principal constraints include inconsistent performance metrics, high software migration costs and the early development stage of end-market demand. TOPS figures disclosed by different suppliers may use different numerical precisions, sparsity assumptions and test conditions and therefore cannot be compared directly. Foundation-model inference is also constrained by memory capacity, bandwidth, power and thermal limits. Higher peak compute does not necessarily produce better robotic task-completion performance. Robot manufacturers depend heavily on ROS 2, real-time operating systems, model compilers, motion-control middleware and functional-safety frameworks. Semiconductor suppliers without a complete software toolchain may struggle to secure volume production programs even when their chips offer competitive theoretical performance.

The market will develop through parallel adoption of high-performance central processors and lower-power application-specific chips. Humanoid and general-purpose robots will use high-compute central processors for multimodal models, industrial and collaborative robots will prioritize determinism, reliability and functional safety, while mobile and service robots will emphasize power efficiency, visual navigation and cost control. Integration of cognitive and motion-control computing, hardware-aware model optimization, multimodal sensor fusion and edge-cloud coordination will be central product-development directions. Suppliers combining chip architecture, software tools, robotic algorithms, developer ecosystems and robot-OEM design wins will hold stronger competitive positions than vendors offering standalone computing silicon.

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

Global Embodied AI Chip market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Embodied AI Chip market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Embodied AI Chip market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

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

- To assess the growth potential for Embodied AI Chip

- 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 Embodied AI Chip 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, Qualcomm Incorporated, Renesas Electronics Corporation, NXP Semiconductors N.V., Texas Instruments Incorporated, Ambarella, Inc., Advanced Micro Devices, Inc., Hailo Technologies Ltd., Synaptics Incorporated, Kneron, Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities,

new product launches or approvals.

Market Segmentation

Embodied AI Chip market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by 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 Type

Central Cognitive AI Processor

Real-Time Motion-Control Processor

Integrated Brain-And-Cerebellum Processor

Perception And Sensor-Fusion Processor

Others

Market segment by Compute Performance

?10 TOPS

10-100 TOPS

100-500 TOPS

?500 TOPS

Market segment by Power

?5W

5W-20W

20W-60W

?60W

Market segment by Application

Humanoid and General-Purpose Robots

Industrial and Collaborative Robots

Autonomous Mobile and Logistics Robots

Service and Medical Robots

Others

Major players covered

NVIDIA Corporation

Qualcomm Incorporated

Renesas Electronics Corporation

NXP Semiconductors N.V.

Texas Instruments Incorporated

Ambarella, Inc.

Advanced Micro Devices, Inc.

Hailo Technologies Ltd.

Synaptics Incorporated

Kneron, Inc.

Intel Corporation

D-Robotics

Black Sesame Technologies Co., Ltd.

Axera Semiconductor Co., Ltd.

Rockchip Electronics Co., Ltd.

Allwinner Technology Co., Ltd.

Cambricon Technologies Corporation Limited

SOPHGO Technologies Ltd.

Kneron, Inc.

Cambricon Technologies Corporation Limited

Huawei Technologies Co., Ltd.

Xixuan Chuangzhi Technology (Wuxi) Co., Ltd.

SemiDrive Technology Inc.

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 Embodied AI Chip product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Embodied AI Chip, with price, sales quantity, revenue, and global market share of Embodied AI Chip from 2021 to 2026.

Chapter 3, the Embodied AI Chip competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Embodied AI Chip 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 Type and by Application, with sales market share and growth rate by 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 Embodied AI Chip market forecast, by regions, by 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 Embodied AI Chip.

Chapter 14 and 15, to describe Embodied AI Chip sales channel, distributors, customers, research findings and conclusion.

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