

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

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Abstracts

The global Embodied AI Chip market size is expected to reach \$ 3185 million by 2032, rising at a market growth of 43.9% CAGR during the forecast period (2026-2032).

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 studies the global Embodied AI Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Embodied AI 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 Embodied AI Chip that contribute to

its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Embodied AI 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Embodied AI Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (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 Embodied AI Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Embodied AI Chip Market, Segmentation by Type:

Central Cognitive AI Processor

Real-Time Motion-Control Processor

Integrated Brain-And-Cerebellum Processor

Perception And Sensor-Fusion Processor

Others

Global Embodied AI Chip Market, Segmentation by Compute Performance:

?10 TOPS

10-100 TOPS

100-500 TOPS

?500 TOPS

Global Embodied AI Chip Market, Segmentation by Power:

?5W

5W-20W

20W-60W

?60W

Global Embodied AI Chip Market, Segmentation by Application:

Humanoid and General-Purpose Robots

Industrial and Collaborative Robots

Autonomous Mobile and Logistics Robots

Service and Medical Robots

Others

Companies Profiled:

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.

Key Questions Answered:

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

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