

Global High-performance AI Chips 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 High-performance AI Chips market size was valued at US\$ 109043 million in 2025 and is forecast to a readjusted size of US\$ 397631 million by 2032 with a CAGR of 19.5% during review period.

In 2025, global High-performance AI Chips capacity 15,000 k Pcs, sales reached approximately 13,500 k Pcs, with an average market price of around 7,850 USD/Pcs, industrial gross margin 54%.

High-performance AI chips have shifted from ?a single accelerator? to a system-level computing product. In cloud environments, GPUs and in-house ASICs are integrated with high-speed interconnects, rack-scale power delivery and liquid cooling to industrialize training and inference as repeatable ?AI factories.? On-device, high-performance AI capabilities are increasingly embedded into SoCs and CPUs, where privacy, power efficiency and user experience define product differentiation. The market?s center of gravity spans three major tracks: NVIDIA-style GPU plus full-stack system platforms; AMD and Intel advancing datacenter accelerators and open software ecosystems; and hyperscalers such as Google, AWS, Microsoft and Meta scaling in-house ASICs to improve supply security and computing economics. At the edge and device level, Apple and Qualcomm are turning NPUs into platform eligibility gates.

Performance evaluation is moving from peak compute toward system efficiency across compute, memory, interconnect and power density. HBM capacity and bandwidth have become decisive factors. MI300X, for example, discloses 192GB HBM3 and peak memory bandwidth of 5.3TB/s, while Gaudi 3 provides up to 128GB HBM and 3.7TB/s,

and TPU v5p publishes per-chip HBM capacity and bandwidth specifications. Low-precision formats such as FP8 and FP4, together with new kernel architectures, are becoming key incremental levers for inference and reasoning workloads. Rack-scale fabrics further improve realized throughput: NVL72 emphasizes a unified 72-GPU domain and approximately 130TB/s-class interconnect bandwidth, while Blackwell Ultra discloses NVLink 5 bandwidth and maximum topology scale. Power density and cooling have also become chip-level constraints rather than merely datacenter infrastructure issues. DGX-class systems publish system power and HBM3e bandwidth, while automotive and robotics platforms increasingly incorporate determinism and safety isolation into the definition of high-performance AI computing, as reflected in the disclosed compute and power envelopes of Thor.

Across the supply chain, high-performance AI computing is increasingly a systems business. Upstream, leading-edge process nodes, advanced packaging technologies such as 2.5D and CoWoS-class integration, and HBM supply determine production ramp-up speed. Midstream competition has expanded from silicon into accelerator boards, servers, racks, networking and software stacks, including compilers, inference runtimes and collective communication libraries, all of which directly affect deployment speed and customer stickiness. Downstream, hyperscalers, internet platforms, automakers and device OEMs convert application requirements into increasingly stringent product specifications. A representative recent development is the incorporation of rack-scale delivery into semiconductor platform competitiveness. AMD has completed its acquisition of ZT Systems, combining CPU, GPU and networking products with rack-scale system engineering capabilities to align more closely with hyperscaler procurement and deployment models.

Growth is expanding along three major lines. First, datacenter high-performance AI chips are shifting from ?single-GPU competition? to ?AI-factory competition,? with hyperscalers increasingly publishing rack- and cluster-scale availability. OCI has disclosed liquid-cooled GB200 NVL72 infrastructure for very large clusters, while SK Group and NVIDIA have announced an AI factory exceeding 50,000 GPUs, centered on manufacturing, digital twins and AI agents. Second, geopolitics and compliance have become integral parts of product roadmaps. The introduction and subsequent rescission of the U.S. AI diffusion framework, together with continuing guidance on advanced computing integrated circuits, are driving more granular supply allocation, SKU design and shipment strategies. Third, on-device high-performance AI capabilities are becoming formal eligibility thresholds. Windows specifies a 40+ TOPS NPU requirement for Copilot+ PCs, Apple discloses a 38 TOPS Neural Engine in the M4 and links on-device generative AI with system-level user experience, while centralized computing

platforms such as Thor indicate the next stage of cockpit and autonomous-driving integration with higher safety-grade computing requirements.

Over the next 12-24 months, the most bankable trend will not simply be larger models, but higher inference volumes, stronger system integration and deeper vertical specialization. FP4 and FP8 inference, together with communication efficiency, will become the primary battleground for improving computing output per watt. HBM and advanced packaging will remain critical supply-side constraints. Sovereign and industry-specific AI factories will expand procurement from chips to complete racks, power infrastructure, liquid cooling and operations software. Robotics and industrial edge applications will broaden demand from computer vision toward multimodal perception and real-time control, creating a second growth curve for high-performance AI chips.

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

Global High-performance AI Chips market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global High-performance AI Chips market size and forecasts, by Technical Architecture and by Application, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global High-performance AI Chips market shares of main players, shipments in revenue (\$ Million), sales quantity (K Pcs), and ASP (US\$/Pcs), 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 High-performance AI Chips

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 High-performance AI Chips 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, AMD, Intel, Google, Microsoft, Amazon, Samsung, Qualcomm, IBM, Apple, etc.

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

Market Segmentation

High-performance AI Chips market is split by Technical Architecture and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Technical Architecture, 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 Technical Architecture

GPU

FPGA

ASIC

Others

Market segment by Function

Training Chip

Inference Chip

Market segment by Industry

Data Center

Automobile

Robot

Consumer Electronics

Medical

Others

Market segment by Application

Cloud Server

Edge and Terminal (Mobile Device)

Major players covered

NVIDIA

AMD

Intel

Google

Microsoft

Amazon

Samsung

Qualcomm

IBM

Apple

Meta

Cerebras Systems

Groq

Graphcore

Tenstorrent

Hailo

SambaNova

Huawei

Cambricon

Horizon Robotics

Biren

Iluvatar CoreX

Moore Threads

MetaX

Enflame

Hygon Information Technology

Changsha Jingjia Microelectronics

Kunlunxin (Baidu)

T-Head (Alibaba)

Hexaflake

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 High-performance AI Chips product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of High-performance AI Chips, with price, sales quantity, revenue, and global market share of High-performance AI Chips from 2021 to 2026.

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

Chapter 4, the High-performance AI Chips 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 Technical Architecture and by Application, with sales market share and growth rate by Technical Architecture, 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 High-performance AI Chips market forecast, by regions, by Technical Architecture, 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 High-performance AI Chips.

Chapter 14 and 15, to describe High-performance AI Chips sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Technical Architecture

1.3.1 Overview: Global High-performance AI Chips Consumption Value by Technical Architecture: 2021 Versus 2025 Versus 2032

1.3.2 GPU

1.3.3 FPGA

1.3.4 ASIC

1.3.5 Others

1.4 Market Analysis by Function

1.4.1 Overview: Global High-performance AI Chips Consumption Value by Function: 2021 Versus 2025 Versus 2032

1.4.2 Training Chip

1.4.3 Inference Chip

1.5 Market Analysis by Industry

1.5.1 Overview: Global High-performance AI Chips Consumption Value by Industry: 2021 Versus 2025 Versus 2032

1.5.2 Data Center

1.5.3 Automobile

1.5.4 Robot

1.5.5 Consumer Electronics

1.5.6 Medical

1.5.7 Others

1.6 Market Analysis by Application

1.6.1 Overview: Global High-performance AI Chips Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 Cloud Server

1.6.3 Edge and Terminal (Mobile Device)

1.7 Global High-performance AI Chips Market Size & Forecast

1.7.1 Global High-performance AI Chips Consumption Value (2021 & 2025 & 2032)

1.7.2 Global High-performance AI Chips Sales Quantity (2021-2032)

1.7.3 Global High-performance AI Chips Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 NVIDIA

2.1.1 NVIDIA Details

2.1.2 NVIDIA Major Business

2.1.3 NVIDIA High-performance AI Chips Product and Services

2.1.4 NVIDIA High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 NVIDIA Recent Developments/Updates

2.2 AMD

2.2.1 AMD Details

2.2.2 AMD Major Business

2.2.3 AMD High-performance AI Chips Product and Services

2.2.4 AMD High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 AMD Recent Developments/Updates

2.3 Intel

2.3.1 Intel Details

2.3.2 Intel Major Business

2.3.3 Intel High-performance AI Chips Product and Services

2.3.4 Intel High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Intel Recent Developments/Updates

2.4 Google

2.4.1 Google Details

2.4.2 Google Major Business

2.4.3 Google High-performance AI Chips Product and Services

2.4.4 Google High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Google Recent Developments/Updates

2.5 Microsoft

2.5.1 Microsoft Details

2.5.2 Microsoft Major Business

2.5.3 Microsoft High-performance AI Chips Product and Services

2.5.4 Microsoft High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Microsoft Recent Developments/Updates

2.6 Amazon

2.6.1 Amazon Details

2.6.2 Amazon Major Business

2.6.3 Amazon High-performance AI Chips Product and Services

2.6.4 Amazon High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Amazon Recent Developments/Updates

2.7 Samsung

2.7.1 Samsung Details

2.7.2 Samsung Major Business

2.7.3 Samsung High-performance AI Chips Product and Services

2.7.4 Samsung High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.7.5 Samsung Recent Developments/Updates

2.8 Qualcomm

2.8.1 Qualcomm Details

2.8.2 Qualcomm Major Business

2.8.3 Qualcomm High-performance AI Chips Product and Services

2.8.4 Qualcomm High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.8.5 Qualcomm Recent Developments/Updates

2.9 IBM

2.9.1 IBM Details

2.9.2 IBM Major Business

2.9.3 IBM High-performance AI Chips Product and Services

2.9.4 IBM High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 IBM Recent Developments/Updates

2.10 Apple

2.10.1 Apple Details

2.10.2 Apple Major Business

2.10.3 Apple High-performance AI Chips Product and Services

2.10.4 Apple High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.10.5 Apple Recent Developments/Updates

2.11 Meta

2.11.1 Meta Details

2.11.2 Meta Major Business

2.11.3 Meta High-performance AI Chips Product and Services

2.11.4 Meta High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.11.5 Meta Recent Developments/Updates

2.12 Cerebras Systems

- 2.12.1 Cerebras Systems Details
- 2.12.2 Cerebras Systems Major Business
- 2.12.3 Cerebras Systems High-performance AI Chips Product and Services
- 2.12.4 Cerebras Systems High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.12.5 Cerebras Systems Recent Developments/Updates
- 2.13 Groq
 - 2.13.1 Groq Details
 - 2.13.2 Groq Major Business
 - 2.13.3 Groq High-performance AI Chips Product and Services
 - 2.13.4 Groq High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.13.5 Groq Recent Developments/Updates
- 2.14 Graphcore
 - 2.14.1 Graphcore Details
 - 2.14.2 Graphcore Major Business
 - 2.14.3 Graphcore High-performance AI Chips Product and Services
 - 2.14.4 Graphcore High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.14.5 Graphcore Recent Developments/Updates
- 2.15 Tenstorrent
 - 2.15.1 Tenstorrent Details
 - 2.15.2 Tenstorrent Major Business
 - 2.15.3 Tenstorrent High-performance AI Chips Product and Services
 - 2.15.4 Tenstorrent High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.15.5 Tenstorrent Recent Developments/Updates
- 2.16 Hailo
 - 2.16.1 Hailo Details
 - 2.16.2 Hailo Major Business
 - 2.16.3 Hailo High-performance AI Chips Product and Services
 - 2.16.4 Hailo High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.16.5 Hailo Recent Developments/Updates
- 2.17 SambaNova
 - 2.17.1 SambaNova Details
 - 2.17.2 SambaNova Major Business
 - 2.17.3 SambaNova High-performance AI Chips Product and Services
 - 2.17.4 SambaNova High-performance AI Chips Sales Quantity, Average Price,

Revenue, Gross Margin and Market Share (2021-2026)

2.17.5 SambaNova Recent Developments/Updates

2.18 Huawei

2.18.1 Huawei Details

2.18.2 Huawei Major Business

2.18.3 Huawei High-performance AI Chips Product and Services

2.18.4 Huawei High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.18.5 Huawei Recent Developments/Updates

2.19 Cambricon

2.19.1 Cambricon Details

2.19.2 Cambricon Major Business

2.19.3 Cambricon High-performance AI Chips Product and Services

2.19.4 Cambricon High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.19.5 Cambricon Recent Developments/Updates

2.20 Horizon Robotics

2.20.1 Horizon Robotics Details

2.20.2 Horizon Robotics Major Business

2.20.3 Horizon Robotics High-performance AI Chips Product and Services

2.20.4 Horizon Robotics High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.20.5 Horizon Robotics Recent Developments/Updates

2.21 Biren

2.21.1 Biren Details

2.21.2 Biren Major Business

2.21.3 Biren High-performance AI Chips Product and Services

2.21.4 Biren High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.21.5 Biren Recent Developments/Updates

2.22 Iluvatar CoreX

2.22.1 Iluvatar CoreX Details

2.22.2 Iluvatar CoreX Major Business

2.22.3 Iluvatar CoreX High-performance AI Chips Product and Services

2.22.4 Iluvatar CoreX High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.22.5 Iluvatar CoreX Recent Developments/Updates

2.23 Moore Threads

2.23.1 Moore Threads Details

- 2.23.2 Moore Threads Major Business
- 2.23.3 Moore Threads High-performance AI Chips Product and Services
- 2.23.4 Moore Threads High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.23.5 Moore Threads Recent Developments/Updates
- 2.24 MetaX
 - 2.24.1 MetaX Details
 - 2.24.2 MetaX Major Business
 - 2.24.3 MetaX High-performance AI Chips Product and Services
 - 2.24.4 MetaX High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.24.5 MetaX Recent Developments/Updates
- 2.25 Enflame
 - 2.25.1 Enflame Details
 - 2.25.2 Enflame Major Business
 - 2.25.3 Enflame High-performance AI Chips Product and Services
 - 2.25.4 Enflame High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.25.5 Enflame Recent Developments/Updates
- 2.26 Hygon Information Technology
 - 2.26.1 Hygon Information Technology Details
 - 2.26.2 Hygon Information Technology Major Business
 - 2.26.3 Hygon Information Technology High-performance AI Chips Product and Services
 - 2.26.4 Hygon Information Technology High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.26.5 Hygon Information Technology Recent Developments/Updates
- 2.27 Changsha Jingjia Microelectronics
 - 2.27.1 Changsha Jingjia Microelectronics Details
 - 2.27.2 Changsha Jingjia Microelectronics Major Business
 - 2.27.3 Changsha Jingjia Microelectronics High-performance AI Chips Product and Services
 - 2.27.4 Changsha Jingjia Microelectronics High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.27.5 Changsha Jingjia Microelectronics Recent Developments/Updates
- 2.28 Kunlunxin (Baidu)
 - 2.28.1 Kunlunxin (Baidu) Details
 - 2.28.2 Kunlunxin (Baidu) Major Business
 - 2.28.3 Kunlunxin (Baidu) High-performance AI Chips Product and Services

2.28.4 Kunlunxin (Baidu) High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.28.5 Kunlunxin (Baidu) Recent Developments/Updates

2.29 T-Head (Alibaba)

2.29.1 T-Head (Alibaba) Details

2.29.2 T-Head (Alibaba) Major Business

2.29.3 T-Head (Alibaba) High-performance AI Chips Product and Services

2.29.4 T-Head (Alibaba) High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.29.5 T-Head (Alibaba) Recent Developments/Updates

2.30 Hexaflake

2.30.1 Hexaflake Details

2.30.2 Hexaflake Major Business

2.30.3 Hexaflake High-performance AI Chips Product and Services

2.30.4 Hexaflake High-performance AI Chips Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.30.5 Hexaflake Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: HIGH-PERFORMANCE AI CHIPS BY MANUFACTURER

3.1 Global High-performance AI Chips Sales Quantity by Manufacturer (2021-2026)

3.2 Global High-performance AI Chips Revenue by Manufacturer (2021-2026)

3.3 Global High-performance AI Chips Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of High-performance AI Chips by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 High-performance AI Chips Manufacturer Market Share in 2025

3.4.3 Top 6 High-performance AI Chips Manufacturer Market Share in 2025

3.5 High-performance AI Chips Market: Overall Company Footprint Analysis

3.5.1 High-performance AI Chips Market: Region Footprint

3.5.2 High-performance AI Chips Market: Company Product Type Footprint

3.5.3 High-performance AI Chips Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global High-performance AI Chips Market Size by Region

- 4.1.1 Global High-performance AI Chips Sales Quantity by Region (2021-2032)
- 4.1.2 Global High-performance AI Chips Consumption Value by Region (2021-2032)
- 4.1.3 Global High-performance AI Chips Average Price by Region (2021-2032)
- 4.2 North America High-performance AI Chips Consumption Value (2021-2032)
- 4.3 Europe High-performance AI Chips Consumption Value (2021-2032)
- 4.4 Asia-Pacific High-performance AI Chips Consumption Value (2021-2032)
- 4.5 South America High-performance AI Chips Consumption Value (2021-2032)
- 4.6 Middle East & Africa High-performance AI Chips Consumption Value (2021-2032)

5 MARKET SEGMENT BY TECHNICAL ARCHITECTURE

- 5.1 Global High-performance AI Chips Sales Quantity by Technical Architecture (2021-2032)
- 5.2 Global High-performance AI Chips Consumption Value by Technical Architecture (2021-2032)
- 5.3 Global High-performance AI Chips Average Price by Technical Architecture (2021-2032)

6 MARKET SEGMENT BY APPLICATION

- 6.1 Global High-performance AI Chips Sales Quantity by Application (2021-2032)
- 6.2 Global High-performance AI Chips Consumption Value by Application (2021-2032)
- 6.3 Global High-performance AI Chips Average Price by Application (2021-2032)

7 NORTH AMERICA

- 7.1 North America High-performance AI Chips Sales Quantity by Technical Architecture (2021-2032)
- 7.2 North America High-performance AI Chips Sales Quantity by Application (2021-2032)
- 7.3 North America High-performance AI Chips Market Size by Country
 - 7.3.1 North America High-performance AI Chips Sales Quantity by Country (2021-2032)
 - 7.3.2 North America High-performance AI Chips Consumption Value by Country (2021-2032)
 - 7.3.3 United States Market Size and Forecast (2021-2032)
 - 7.3.4 Canada Market Size and Forecast (2021-2032)
 - 7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe High-performance AI Chips Sales Quantity by Technical Architecture (2021-2032)

8.2 Europe High-performance AI Chips Sales Quantity by Application (2021-2032)

8.3 Europe High-performance AI Chips Market Size by Country

8.3.1 Europe High-performance AI Chips Sales Quantity by Country (2021-2032)

8.3.2 Europe High-performance AI Chips Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific High-performance AI Chips Sales Quantity by Technical Architecture (2021-2032)

9.2 Asia-Pacific High-performance AI Chips Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific High-performance AI Chips Market Size by Region

9.3.1 Asia-Pacific High-performance AI Chips Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific High-performance AI Chips Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America High-performance AI Chips Sales Quantity by Technical Architecture (2021-2032)

10.2 South America High-performance AI Chips Sales Quantity by Application (2021-2032)

10.3 South America High-performance AI Chips Market Size by Country

10.3.1 South America High-performance AI Chips Sales Quantity by Country (2021-2032)

10.3.2 South America High-performance AI Chips Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa High-performance AI Chips Sales Quantity by Technical Architecture (2021-2032)

11.2 Middle East & Africa High-performance AI Chips Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa High-performance AI Chips Market Size by Country

11.3.1 Middle East & Africa High-performance AI Chips Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa High-performance AI Chips Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 High-performance AI Chips Market Drivers

12.2 High-performance AI Chips Market Restraints

12.3 High-performance AI Chips Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of High-performance AI Chips and Key Manufacturers

13.2 Manufacturing Costs Percentage of High-performance AI Chips

13.3 High-performance AI Chips Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 High-performance AI Chips Typical Distributors

14.3 High-performance AI Chips Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global High-performance AI Chips Consumption Value by Technical Architecture, (USD Million), 2021 & 2025 & 2032

Table 2. Global High-performance AI Chips Consumption Value by Function, (USD Million), 2021 & 2025 & 2032

Table 3. Global High-performance AI Chips Consumption Value by Industry, (USD Million), 2021 & 2025 & 2032

Table 4. Global High-performance AI Chips Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. NVIDIA Basic Information, Manufacturing Base and Competitors

Table 6. NVIDIA Major Business

Table 7. NVIDIA High-performance AI Chips Product and Services

Table 8. NVIDIA High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. NVIDIA Recent Developments/Updates

Table 10. AMD Basic Information, Manufacturing Base and Competitors

Table 11. AMD Major Business

Table 12. AMD High-performance AI Chips Product and Services

Table 13. AMD High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. AMD Recent Developments/Updates

Table 15. Intel Basic Information, Manufacturing Base and Competitors

Table 16. Intel Major Business

Table 17. Intel High-performance AI Chips Product and Services

Table 18. Intel High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. Intel Recent Developments/Updates

Table 20. Google Basic Information, Manufacturing Base and Competitors

Table 21. Google Major Business

Table 22. Google High-performance AI Chips Product and Services

Table 23. Google High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. Google Recent Developments/Updates

Table 25. Microsoft Basic Information, Manufacturing Base and Competitors

Table 26. Microsoft Major Business

Table 27. Microsoft High-performance AI Chips Product and Services

Table 28. Microsoft High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. Microsoft Recent Developments/Updates

Table 30. Amazon Basic Information, Manufacturing Base and Competitors

Table 31. Amazon Major Business

Table 32. Amazon High-performance AI Chips Product and Services

Table 33. Amazon High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Amazon Recent Developments/Updates

Table 35. Samsung Basic Information, Manufacturing Base and Competitors

Table 36. Samsung Major Business

Table 37. Samsung High-performance AI Chips Product and Services

Table 38. Samsung High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. Samsung Recent Developments/Updates

Table 40. Qualcomm Basic Information, Manufacturing Base and Competitors

Table 41. Qualcomm Major Business

Table 42. Qualcomm High-performance AI Chips Product and Services

Table 43. Qualcomm High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Qualcomm Recent Developments/Updates

Table 45. IBM Basic Information, Manufacturing Base and Competitors

Table 46. IBM Major Business

Table 47. IBM High-performance AI Chips Product and Services

Table 48. IBM High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. IBM Recent Developments/Updates

Table 50. Apple Basic Information, Manufacturing Base and Competitors

Table 51. Apple Major Business

Table 52. Apple High-performance AI Chips Product and Services

Table 53. Apple High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 54. Apple Recent Developments/Updates

Table 55. Meta Basic Information, Manufacturing Base and Competitors

Table 56. Meta Major Business

Table 57. Meta High-performance AI Chips Product and Services

Table 58. Meta High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 59. Meta Recent Developments/Updates

Table 60. Cerebras Systems Basic Information, Manufacturing Base and Competitors

Table 61. Cerebras Systems Major Business

Table 62. Cerebras Systems High-performance AI Chips Product and Services

Table 63. Cerebras Systems High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 64. Cerebras Systems Recent Developments/Updates

Table 65. Groq Basic Information, Manufacturing Base and Competitors

Table 66. Groq Major Business

Table 67. Groq High-performance AI Chips Product and Services

Table 68. Groq High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 69. Groq Recent Developments/Updates

Table 70. Graphcore Basic Information, Manufacturing Base and Competitors

Table 71. Graphcore Major Business

Table 72. Graphcore High-performance AI Chips Product and Services

Table 73. Graphcore High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 74. Graphcore Recent Developments/Updates

Table 75. Tenstorrent Basic Information, Manufacturing Base and Competitors

Table 76. Tenstorrent Major Business

Table 77. Tenstorrent High-performance AI Chips Product and Services

Table 78. Tenstorrent High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Tenstorrent Recent Developments/Updates

Table 80. Hailo Basic Information, Manufacturing Base and Competitors

Table 81. Hailo Major Business

Table 82. Hailo High-performance AI Chips Product and Services

Table 83. Hailo High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Hailo Recent Developments/Updates

Table 85. SambaNova Basic Information, Manufacturing Base and Competitors

Table 86. SambaNova Major Business

Table 87. SambaNova High-performance AI Chips Product and Services

Table 88. SambaNova High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 89. SambaNova Recent Developments/Updates

Table 90. Huawei Basic Information, Manufacturing Base and Competitors

Table 91. Huawei Major Business

Table 92. Huawei High-performance AI Chips Product and Services
Table 93. Huawei High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 94. Huawei Recent Developments/Updates
Table 95. Cambricon Basic Information, Manufacturing Base and Competitors
Table 96. Cambricon Major Business
Table 97. Cambricon High-performance AI Chips Product and Services
Table 98. Cambricon High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 99. Cambricon Recent Developments/Updates
Table 100. Horizon Robotics Basic Information, Manufacturing Base and Competitors
Table 101. Horizon Robotics Major Business
Table 102. Horizon Robotics High-performance AI Chips Product and Services
Table 103. Horizon Robotics High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 104. Horizon Robotics Recent Developments/Updates
Table 105. Biren Basic Information, Manufacturing Base and Competitors
Table 106. Biren Major Business
Table 107. Biren High-performance AI Chips Product and Services
Table 108. Biren High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Biren Recent Developments/Updates
Table 110. Iluvatar CoreX Basic Information, Manufacturing Base and Competitors
Table 111. Iluvatar CoreX Major Business
Table 112. Iluvatar CoreX High-performance AI Chips Product and Services
Table 113. Iluvatar CoreX High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 114. Iluvatar CoreX Recent Developments/Updates
Table 115. Moore Threads Basic Information, Manufacturing Base and Competitors
Table 116. Moore Threads Major Business
Table 117. Moore Threads High-performance AI Chips Product and Services
Table 118. Moore Threads High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 119. Moore Threads Recent Developments/Updates
Table 120. MetaX Basic Information, Manufacturing Base and Competitors
Table 121. MetaX Major Business
Table 122. MetaX High-performance AI Chips Product and Services
Table 123. MetaX High-performance AI Chips Sales Quantity (K Pcs), Average Price

(US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 124. MetaX Recent Developments/Updates

Table 125. Enflame Basic Information, Manufacturing Base and Competitors

Table 126. Enflame Major Business

Table 127. Enflame High-performance AI Chips Product and Services

Table 128. Enflame High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 129. Enflame Recent Developments/Updates

Table 130. Hygon Information Technology Basic Information, Manufacturing Base and Competitors

Table 131. Hygon Information Technology Major Business

Table 132. Hygon Information Technology High-performance AI Chips Product and Services

Table 133. Hygon Information Technology High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. Hygon Information Technology Recent Developments/Updates

Table 135. Changsha Jingjia Microelectronics Basic Information, Manufacturing Base and Competitors

Table 136. Changsha Jingjia Microelectronics Major Business

Table 137. Changsha Jingjia Microelectronics High-performance AI Chips Product and Services

Table 138. Changsha Jingjia Microelectronics High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Changsha Jingjia Microelectronics Recent Developments/Updates

Table 140. Kunlunxin (Baidu) Basic Information, Manufacturing Base and Competitors

Table 141. Kunlunxin (Baidu) Major Business

Table 142. Kunlunxin (Baidu) High-performance AI Chips Product and Services

Table 143. Kunlunxin (Baidu) High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 144. Kunlunxin (Baidu) Recent Developments/Updates

Table 145. T-Head (Alibaba) Basic Information, Manufacturing Base and Competitors

Table 146. T-Head (Alibaba) Major Business

Table 147. T-Head (Alibaba) High-performance AI Chips Product and Services

Table 148. T-Head (Alibaba) High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 149. T-Head (Alibaba) Recent Developments/Updates
Table 150. Hexaflake Basic Information, Manufacturing Base and Competitors
Table 151. Hexaflake Major Business
Table 152. Hexaflake High-performance AI Chips Product and Services
Table 153. Hexaflake High-performance AI Chips Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 154. Hexaflake Recent Developments/Updates
Table 155. Global High-performance AI Chips Sales Quantity by Manufacturer (2021-2026) & (K Pcs)
Table 156. Global High-performance AI Chips Revenue by Manufacturer (2021-2026) & (USD Million)
Table 157. Global High-performance AI Chips Average Price by Manufacturer (2021-2026) & (US\$/Pcs)
Table 158. Market Position of Manufacturers in High-performance AI Chips, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
Table 159. Head Office and High-performance AI Chips Production Site of Key Manufacturer
Table 160. High-performance AI Chips Market: Company Product Type Footprint
Table 161. High-performance AI Chips Market: Company Product Application Footprint
Table 162. High-performance AI Chips New Market Entrants and Barriers to Market Entry
Table 163. High-performance AI Chips Mergers, Acquisition, Agreements, and Collaborations
Table 164. Global High-performance AI Chips Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
Table 165. Global High-performance AI Chips Sales Quantity by Region (2021-2026) & (K Pcs)
Table 166. Global High-performance AI Chips Sales Quantity by Region (2027-2032) & (K Pcs)
Table 167. Global High-performance AI Chips Consumption Value by Region (2021-2026) & (USD Million)
Table 168. Global High-performance AI Chips Consumption Value by Region (2027-2032) & (USD Million)
Table 169. Global High-performance AI Chips Average Price by Region (2021-2026) & (US\$/Pcs)
Table 170. Global High-performance AI Chips Average Price by Region (2027-2032) & (US\$/Pcs)
Table 171. Global High-performance AI Chips Sales Quantity by Technical Architecture (2021-2026) & (K Pcs)

Table 172. Global High-performance AI Chips Sales Quantity by Technical Architecture (2027-2032) & (K Pcs)

Table 173. Global High-performance AI Chips Consumption Value by Technical Architecture (2021-2026) & (USD Million)

Table 174. Global High-performance AI Chips Consumption Value by Technical Architecture (2027-2032) & (USD Million)

Table 175. Global High-performance AI Chips Average Price by Technical Architecture (2021-2026) & (US\$/Pcs)

Table 176. Global High-performance AI Chips Average Price by Technical Architecture (2027-2032) & (US\$/Pcs)

Table 177. Global High-performance AI Chips Sales Quantity by Application (2021-2026) & (K Pcs)

Table 178. Global High-performance AI Chips Sales Quantity by Application (2027-2032) & (K Pcs)

Table 179. Global High-performance AI Chips Consumption Value by Application (2021-2026) & (USD Million)

Table 180. Global High-performance AI Chips Consumption Value by Application (2027-2032) & (USD Million)

Table 181. Global High-performance AI Chips Average Price by Application (2021-2026) & (US\$/Pcs)

Table 182. Global High-performance AI Chips Average Price by Application (2027-2032) & (US\$/Pcs)

Table 183. North America High-performance AI Chips Sales Quantity by Technical Architecture (2021-2026) & (K Pcs)

Table 184. North America High-performance AI Chips Sales Quantity by Technical Architecture (2027-2032) & (K Pcs)

Table 185. North America High-performance AI Chips Sales Quantity by Application (2021-2026) & (K Pcs)

Table 186. North America High-performance AI Chips Sales Quantity by Application (2027-2032) & (K Pcs)

Table 187. North America High-performance AI Chips Sales Quantity by Country (2021-2026) & (K Pcs)

Table 188. North America High-performance AI Chips Sales Quantity by Country (2027-2032) & (K Pcs)

Table 189. North America High-performance AI Chips Consumption Value by Country (2021-2026) & (USD Million)

Table 190. North America High-performance AI Chips Consumption Value by Country (2027-2032) & (USD Million)

Table 191. Europe High-performance AI Chips Sales Quantity by Technical Architecture

(2021-2026) & (K Pcs)

Table 192. Europe High-performance AI Chips Sales Quantity by Technical Architecture (2027-2032) & (K Pcs)

Table 193. Europe High-performance AI Chips Sales Quantity by Application (2021-2026) & (K Pcs)

Table 194. Europe High-performance AI Chips Sales Quantity by Application (2027-2032) & (K Pcs)

Table 195. Europe High-performance AI Chips Sales Quantity by Country (2021-2026) & (K Pcs)

Table 196. Europe High-performance AI Chips Sales Quantity by Country (2027-2032) & (K Pcs)

Table 197. Europe High-performance AI Chips Consumption Value by Country (2021-2026) & (USD Million)

Table 198. Europe High-performance AI Chips Consumption Value by Country (2027-2032) & (USD Million)

Table 199. Asia-Pacific High-performance AI Chips Sales Quantity by Technical Architecture (2021-2026) & (K Pcs)

Table 200. Asia-Pacific High-performance AI Chips Sales Quantity by Technical Architecture (2027-2032) & (K Pcs)

Table 201. Asia-Pacific High-performance AI Chips Sales Quantity by Application (2021-2026) & (K Pcs)

Table 202. Asia-Pacific High-performance AI Chips Sales Quantity by Application (2027-2032) & (K Pcs)

Table 203. Asia-Pacific High-performance AI Chips Sales Quantity by Region (2021-2026) & (K Pcs)

Table 204. Asia-Pacific High-performance AI Chips Sales Quantity by Region (2027-2032) & (K Pcs)

Table 205. Asia-Pacific High-performance AI Chips Consumption Value by Region (2021-2026) & (USD Million)

Table 206. Asia-Pacific High-performance AI Chips Consumption Value by Region (2027-2032) & (USD Million)

Table 207. South America High-performance AI Chips Sales Quantity by Technical Architecture (2021-2026) & (K Pcs)

Table 208. South America High-performance AI Chips Sales Quantity by Technical Architecture (2027-2032) & (K Pcs)

Table 209. South America High-performance AI Chips Sales Quantity by Application (2021-2026) & (K Pcs)

Table 210. South America High-performance AI Chips Sales Quantity by Application (2027-2032) & (K Pcs)

Table 211. South America High-performance AI Chips Sales Quantity by Country (2021-2026) & (K Pcs)

Table 212. South America High-performance AI Chips Sales Quantity by Country (2027-2032) & (K Pcs)

Table 213. South America High-performance AI Chips Consumption Value by Country (2021-2026) & (USD Million)

Table 214. South America High-performance AI Chips Consumption Value by Country (2027-2032) & (USD Million)

Table 215. Middle East & Africa High-performance AI Chips Sales Quantity by Technical Architecture (2021-2026) & (K Pcs)

Table 216. Middle East & Africa High-performance AI Chips Sales Quantity by Technical Architecture (2027-2032) & (K Pcs)

Table 217. Middle East & Africa High-performance AI Chips Sales Quantity by Application (2021-2026) & (K Pcs)

Table 218. Middle East & Africa High-performance AI Chips Sales Quantity by Application (2027-2032) & (K Pcs)

Table 219. Middle East & Africa High-performance AI Chips Sales Quantity by Country (2021-2026) & (K Pcs)

Table 220. Middle East & Africa High-performance AI Chips Sales Quantity by Country (2027-2032) & (K Pcs)

Table 221. Middle East & Africa High-performance AI Chips Consumption Value by Country (2021-2026) & (USD Million)

Table 222. Middle East & Africa High-performance AI Chips Consumption Value by Country (2027-2032) & (USD Million)

Table 223. High-performance AI Chips Raw Material

Table 224. Key Manufacturers of High-performance AI Chips Raw Materials

Table 225. High-performance AI Chips Typical Distributors

Table 226. High-performance AI Chips Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. High-performance AI Chips Picture

Figure 2. Global High-performance AI Chips Revenue by Technical Architecture, (USD Million), 2021 & 2025 & 2032

Figure 3. Global High-performance AI Chips Revenue Market Share by Technical Architecture in 2025

Figure 4. GPU Examples

Figure 5. FPGA Examples

Figure 6. ASIC Examples

Figure 7. Others Examples

Figure 8. Global High-performance AI Chips Revenue by Function, (USD Million), 2021 & 2025 & 2032

Figure 9. Global High-performance AI Chips Revenue Market Share by Function in 2025

Figure 10. Training Chip Examples

Figure 11. Inference Chip Examples

Figure 12. Global High-performance AI Chips Revenue by Industry, (USD Million), 2021 & 2025 & 2032

Figure 13. Global High-performance AI Chips Revenue Market Share by Industry in 2025

Figure 14. Data Center Examples

Figure 15. Automobile Examples

Figure 16. Robot Examples

Figure 17. Consumer Electronics Examples

Figure 18. Medical Examples

Figure 19. Others Examples

Figure 20. Global High-performance AI Chips Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 21. Global High-performance AI Chips Revenue Market Share by Application in 2025

Figure 22. Cloud Server Examples

Figure 23. Edge and Terminal (Mobile Device) Examples

Figure 24. Global High-performance AI Chips Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 25. Global High-performance AI Chips Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 26. Global High-performance AI Chips Sales Quantity (2021-2032) & (K Pcs)

Figure 27. Global High-performance AI Chips Price (2021-2032) & (US\$/Pcs)

Figure 28. Global High-performance AI Chips Sales Quantity Market Share by Manufacturer in 2025

Figure 29. Global High-performance AI Chips Revenue Market Share by Manufacturer in 2025

Figure 30. Producer Shipments of High-performance AI Chips by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 31. Top 3 High-performance AI Chips Manufacturer (Revenue) Market Share in 2025

Figure 32. Top 6 High-performance AI Chips Manufacturer (Revenue) Market Share in 2025

Figure 33. Global High-performance AI Chips Sales Quantity Market Share by Region (2021-2032)

Figure 34. Global High-performance AI Chips Consumption Value Market Share by Region (2021-2032)

Figure 35. North America High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 36. Europe High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 37. Asia-Pacific High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 38. South America High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 39. Middle East & Africa High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 40. Global High-performance AI Chips Sales Quantity Market Share by Technical Architecture (2021-2032)

Figure 41. Global High-performance AI Chips Consumption Value Market Share by Technical Architecture (2021-2032)

Figure 42. Global High-performance AI Chips Average Price by Technical Architecture (2021-2032) & (US\$/Pcs)

Figure 43. Global High-performance AI Chips Sales Quantity Market Share by Application (2021-2032)

Figure 44. Global High-performance AI Chips Revenue Market Share by Application (2021-2032)

Figure 45. Global High-performance AI Chips Average Price by Application (2021-2032) & (US\$/Pcs)

Figure 46. North America High-performance AI Chips Sales Quantity Market Share by

Technical Architecture (2021-2032)

Figure 47. North America High-performance AI Chips Sales Quantity Market Share by Application (2021-2032)

Figure 48. North America High-performance AI Chips Sales Quantity Market Share by Country (2021-2032)

Figure 49. North America High-performance AI Chips Consumption Value Market Share by Country (2021-2032)

Figure 50. United States High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 51. Canada High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 52. Mexico High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 53. Europe High-performance AI Chips Sales Quantity Market Share by Technical Architecture (2021-2032)

Figure 54. Europe High-performance AI Chips Sales Quantity Market Share by Application (2021-2032)

Figure 55. Europe High-performance AI Chips Sales Quantity Market Share by Country (2021-2032)

Figure 56. Europe High-performance AI Chips Consumption Value Market Share by Country (2021-2032)

Figure 57. Germany High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 58. France High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 59. United Kingdom High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 60. Russia High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 61. Italy High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 62. Asia-Pacific High-performance AI Chips Sales Quantity Market Share by Technical Architecture (2021-2032)

Figure 63. Asia-Pacific High-performance AI Chips Sales Quantity Market Share by Application (2021-2032)

Figure 64. Asia-Pacific High-performance AI Chips Sales Quantity Market Share by Region (2021-2032)

Figure 65. Asia-Pacific High-performance AI Chips Consumption Value Market Share by Region (2021-2032)

Figure 66. China High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 67. Japan High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 68. South Korea High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 69. India High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 70. Southeast Asia High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 71. Australia High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 72. South America High-performance AI Chips Sales Quantity Market Share by Technical Architecture (2021-2032)

Figure 73. South America High-performance AI Chips Sales Quantity Market Share by Application (2021-2032)

Figure 74. South America High-performance AI Chips Sales Quantity Market Share by Country (2021-2032)

Figure 75. South America High-performance AI Chips Consumption Value Market Share by Country (2021-2032)

Figure 76. Brazil High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 77. Argentina High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 78. Middle East & Africa High-performance AI Chips Sales Quantity Market Share by Technical Architecture (2021-2032)

Figure 79. Middle East & Africa High-performance AI Chips Sales Quantity Market Share by Application (2021-2032)

Figure 80. Middle East & Africa High-performance AI Chips Sales Quantity Market Share by Country (2021-2032)

Figure 81. Middle East & Africa High-performance AI Chips Consumption Value Market Share by Country (2021-2032)

Figure 82. Turkey High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 83. Egypt High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 84. Saudi Arabia High-performance AI Chips Consumption Value (2021-2032) & (USD Million)

Figure 85. South Africa High-performance AI Chips Consumption Value (2021-2032) &

(USD Million)

Figure 86. High-performance AI Chips Market Drivers

Figure 87. High-performance AI Chips Market Restraints

Figure 88. High-performance AI Chips Market Trends

Figure 89. Porters Five Forces Analysis

Figure 90. Manufacturing Cost Structure Analysis of High-performance AI Chips in 2025

Figure 91. Manufacturing Process Analysis of High-performance AI Chips

Figure 92. High-performance AI Chips Industrial Chain

Figure 93. Sales Channel: Direct to End-User vs Distributors

Figure 94. Direct Channel Pros & Cons

Figure 95. Indirect Channel Pros & Cons

Figure 96. Methodology

Figure 97. Research Process and Data Source

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