

# Global High-performance AI Chips Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GC4755E44AF3EN.html>

Date: August 2026

Pages: 179

Price: US\$ 4,480.00 (Single User License)

ID: GC4755E44AF3EN

## Abstracts

The global High-performance AI Chips market size is expected to reach \$ 397631 million by 2032, rising at a market growth of 19.5% CAGR during the forecast period (2026-2032).

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 studies the global High-performance AI Chips production, demand, key manufacturers, and key regions.

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

#### Highlights and key features of the study

Global High-performance AI Chips total production and demand, 2021-2032, (K Pcs)

Global High-performance AI Chips total production value, 2021-2032, (USD Million)

Global High-performance AI Chips production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global High-performance AI Chips consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: High-performance AI Chips domestic production, consumption, key domestic manufacturers and share

Global High-performance AI Chips production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global High-performance AI Chips production by Technical Architecture, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global High-performance AI Chips production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global High-performance AI Chips 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, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World High-performance AI Chips market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pcs) by manufacturer, by Technical Architecture, 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 High-performance AI Chips Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global High-performance AI Chips Market, Segmentation by Technical Architecture:

GPU

FPGA

ASIC

Others

#### Global High-performance AI Chips Market, Segmentation by Function:

Training Chip

Inference Chip

#### Global High-performance AI Chips Market, Segmentation by Industry:

Data Center

Automobile

Robot

Consumer Electronics

Medical

Others

#### Global High-performance AI Chips Market, Segmentation by Application:

Cloud Server

Edge and Terminal (Mobile Device)

#### Companies Profiled:

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

#### Key Questions Answered:

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

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