

Global Large-Model AI Accelerator 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 Large-Model AI Accelerator Chips market size was valued at US\$ 224826 million in 2025 and is forecast to a readjusted size of US\$ 1097725 million by 2032 with a CAGR of 22.0% during review period.

Large-Model AI Accelerator Chips are semiconductor processors, accelerator cards, modules and custom compute devices designed to accelerate large language models, multimodal foundation models, generative AI applications, recommender systems and agentic AI workloads. Their core capabilities are built around high-throughput tensor and matrix computation, low-precision arithmetic, high-bandwidth memory access, on-chip and scale-out interconnects, compiler support, runtime software stacks and cluster-level execution. The scope of this study focuses on AI GPUs, AI ASICs, NPUs, TPUs, XPU, RDUs, LPUs, IPU and related accelerator modules that can support large-model training, post-training, fine-tuning, inference, token generation and multimodal AI workloads in cloud, data center and high-performance edge environments.

Based on our research, the large-model AI accelerator chip industry has moved beyond a single ?GPU accelerator? framework and is now evolving into a multi-architecture competition among AI GPUs, custom ASICs, TPUs, XPU, RDUs, LPUs and cloud providers? in-house accelerators. The core of the industry is no longer just peak chip performance; it is a full-stack competition involving advanced process nodes, high-bandwidth memory, advanced packaging, scale-up and scale-out interconnects, system software, compilers, runtime libraries, model compatibility and customer switching costs. NVIDIA remains the structural leader due to its CUDA ecosystem, Blackwell platform and entrenched data center customer base. AMD, Intel, Broadcom, Google, AWS,

Microsoft, Meta and Huawei are competing through different approaches, ranging from merchant AI GPUs and Gaudi accelerators to custom ASICs and captive cloud chips. For analytical purposes, using ?NPU? alone would materially understate the real industry boundary, so this study adopts ?Large-Model AI Accelerator Chips? as the standard scope.

From the demand-side perspective, frontier model training still requires high-end GPUs and large-scale high-bandwidth clusters, but the incremental growth is increasingly shifting toward inference, real-time token generation, long-context processing, multimodal workloads and agentic AI. Training accelerators are evaluated by FP8/BF16 throughput, HBM capacity, interconnect bandwidth and software maturity, while inference accelerators compete on tokens per watt, tokens per dollar, latency, KV-cache efficiency, model switching speed and rack-level utilization. The expansion of in-house accelerators by Google, AWS, Microsoft and Meta shows that leading cloud customers are increasingly aligning chip design with their own models, serving systems and data-center architectures. The likely market structure is not a simple replacement of GPUs by ASICs, but a workload split in which flexible GPUs remain central for training and heterogeneous development, while custom ASICs gain share in high-volume stable inference.

From the policy and industry-cycle perspective, export controls, domestic substitution, AI data-center capital expenditure, HBM availability and advanced packaging capacity are becoming decisive variables. Chinese vendors still face constraints in leading-edge foundry access, HBM supply, advanced packaging and software ecosystems, but local AI infrastructure demand and policy support are creating a large protected market for domestic accelerators. Over the next three to five years, competition will shift from single-card benchmark claims to system-level total cost of ownership, cluster reliability, model migration cost, inference energy efficiency and supply-chain resilience. The industry remains in a high-growth phase, while substitution risks come from both directions: hyperscalers? in-house ASICs may reduce merchant GPU dependence, and model-level efficiency improvements such as quantization, sparsity, MoE routing and serving-stack optimization may reduce accelerator demand per unit of AI output.

This report is a detailed and comprehensive analysis for global Large-Model AI Accelerator Chips 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 Large-Model AI Accelerator Chips market size and forecasts, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

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

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

Global Large-Model AI Accelerator Chips market shares of main players, shipments in revenue (\$ Million), sales quantity (Million 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 Large-Model AI Accelerator 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 Large-Model AI Accelerator 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 Corporation, Alphabet Inc., Amazon.com, Inc., Broadcom Inc., Microsoft Corporation, Meta Platforms, Inc., Advanced Micro Devices, Inc., Huawei Technologies Co., Ltd., Intel Corporation, Marvell Technology, Inc., etc.

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

new product launches or approvals.

Market Segmentation

Large-Model AI Accelerator Chips 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

AI GPU

AI ASIC

NPU / XPU

TPU-like Accelerator

Other

Market segment by Numerical Precision

FP32 / TF32

BF16 / FP16

FP8

INT8

INT4 / FP4

Other

Market segment by Memory and Packaging

HBM-based Accelerator

GDDR-based Accelerator

DDR / LPDDR-based Accelerator

Other

Market segment by Interconnect and Scalability

PCIe-based Scaling

Ethernet-based Scaling

Other

Market segment by Application

Cloud Computing & AI Infrastructure

Healthcare & Life Sciences

Energy & Utilities

Consumer Electronics

Other

Major players covered

NVIDIA Corporation

Alphabet Inc.

Amazon.com, Inc.

Broadcom Inc.

Microsoft Corporation

Meta Platforms, Inc.

Advanced Micro Devices, Inc.

Huawei Technologies Co., Ltd.

Intel Corporation

Marvell Technology, Inc.

OpenAI, L.L.C.

Qualcomm Incorporated

Alibaba Group Holding Limited

Cambricon Technologies Corporation Limited

Hygon Information Technology Co., Ltd.

Cerebras Systems, Inc.

Groq, Inc.

SambaNova Systems, Inc.

d-Matrix Corporation

Tenstorrent Inc.

Rebellions Inc.

FuriosaAI, Inc.

Moore Threads Technology Co., Ltd.

Shanghai Enflame Technology Co., Ltd.

Kunlunxin Technology Co., Ltd.

Shanghai Biren Intelligent Technology Co., Ltd.

MetaX Integrated Circuits Co., Ltd.

Iluvatar CoreX

Hailo Technologies Ltd.

SiMa.ai

Axelera AI B.V.

Etched AI 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 Large-Model AI Accelerator Chips product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Large-Model AI Accelerator 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 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 Large-Model AI Accelerator Chips 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 Large-Model AI Accelerator Chips.

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