

# Global NPU 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 NPU Chip market size was valued at US\$ 46598 million in 2025 and is forecast to a readjusted size of US\$ 145061 million by 2032 with a CAGR of 16.9% during review period.

NPU chips, or neural processing unit chips, are dedicated or semi-dedicated processors designed for artificial intelligence neural network computing tasks and represent an important branch of AI accelerator chips. They mainly address the limitations of traditional CPUs in large-scale matrix multiplication, convolution operations, tensor computing, attention mechanisms, low-precision inference, and real-time perception tasks, including insufficient energy efficiency, relatively high latency, and limited parallel throughput. Unlike CPUs, which emphasize general-purpose control capabilities, or GPUs, which emphasize large-scale parallel graphics and general-purpose computing, NPUs are typically optimized around the operator structure of neural network models. Through tensor computing units, on-chip cache, dataflow scheduling, model quantization, sparse computing, low-bit integer computing, and hardware-software co-compilation, NPUs improve AI inference capability per unit of power consumption.

NPU chips are a critical hardware foundation that connects algorithmic models, terminal devices, data centers, and industry-specific scenarios. Their main applications include on-device image recognition, voice wake-up, facial recognition, structured video analytics, autonomous driving perception, intelligent cockpit interaction, robotic vision, industrial defect inspection, local AI inference on AI PCs, generative AI on smartphones, and edge server inference. In the early stage, NPUs mainly served lightweight vision and speech models, with an emphasis on INT8 inference and low power consumption. They have since evolved toward multi-precision computing, Transformer model adaptation, enhanced on-chip memory, dataflow architectures, on-device large models,

and multimodal inference. In the current market, demand is gradually expanding toward cloud inference, edge inference, and on-device intelligence. Scenarios such as smartphones, automobiles, security, industrial applications, PCs, and robotics are all strengthening local AI processing capabilities. The upstream segments of NPU chips include semiconductor IP, EDA tools, advanced-node wafer foundry services, packaging and testing, high-bandwidth memory, silicon wafers, photoresists, electronic specialty gases, advanced substrates, and thermal management materials. Downstream applications cover consumer electronics, intelligent vehicles, industrial manufacturing, security monitoring, cloud services, communications equipment, medical imaging, robotics, and smart cities. Upstream supply capabilities directly affect the cost, delivery schedule, process-node advancement, and performance ceiling of NPU chips. Advanced wafer manufacturing, advanced packaging, and high-performance memory have an especially significant impact on high-end AI processors. Downstream application scale determines the pace of mass production and price elasticity. Smartphones, IoT devices, and cameras place greater emphasis on low cost and low power consumption. Automobiles place greater emphasis on automotive-grade certification, functional safety, and long-term supply. Data centers place greater emphasis on throughput, memory bandwidth, and system-level energy efficiency. High-end data center NPUs, automotive intelligent-driving NPUs, and large-model inference chips rely on advanced process nodes, complex packaging, high-speed interconnects, high-reliability validation, and mature software ecosystems. As a result, their prices are expected to remain relatively resilient in the short term, and their unit product value will remain high. By contrast, NPUs used in consumer electronics, smart cameras, IoT devices, and lightweight edge AI applications will continue to decline in price as process technologies mature, IP reuse increases, SoC integration improves, and the number of suppliers grows. This will be reflected in a declining cost per TOPS and rising AI computing power per device. In terms of output, the standardization of AI functions in smartphones, PCs, automobiles, and edge devices will drive NPUs from high-end configurations into mid-range and lower-end devices. Embedded NPU shipments will be significantly higher than those of standalone accelerator cards. However, standalone AI accelerators and server-grade NPUs will still account for a relatively high share of revenue in cloud inference, video analytics, and enterprise AI infrastructure. In terms of market size, the broader AI chip market will be jointly driven by generative AI, intelligent driving, AI PCs, robotics, and edge AI, with particularly strong growth in edge AI accelerators and automotive edge AI accelerators. Overall, over the next one to three years, NPU chips are expected to become foundational hardware in computing systems, while long-term price declines and rapid expansion of the total market size occur simultaneously.

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

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

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

Global NPU Chip market shares of main players, shipments in revenue (\$ Million), sales quantity (K 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 NPU 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 NPU 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 Intel, AMD, Hailo, Kneron, Syntiant, NXP, STMicroelectronics,

Axelera AI, SiMa.ai, Renesas, etc.

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

## Market Segmentation

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

Standalone NPU Chip

NPU-Integrated SoC Chip

### Market segment by Application Field

Digital Tensor NPU Chip

Vision-Specific NPU Chip

Compute-In-Memory NPU Chip

Other

### Market segment by Technology Implementation Form

General Tensor NPU Chip

Vision Inference NPU Chip

Audio And Sensor NPU Chip

Other

## Market segment by Application

Cloud Computing

PC Terminal

Mobile Terminal

Automotive Electronics

Industrial Vision

IoT Terminal

## Major players covered

Intel

AMD

Hailo

Kneron

Syntiant

NXP

STMicroelectronics

Axelera AI

SiMa.ai

Renesas

EdgeCortix

Socionext

Samsung Electronics

DEEPX

FuriosaAI

Rebellions

Mobilint

MediaTek

Himax

Cambricon

Huawei

Horizon Robotics

Black Sesame Technologies

Rockchip

Allwinner

UNISOC

MemryX

Beijing Ingenic

Market segment by region, regional analysis covers

*Global NPU Chip Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032*

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

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

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

Chapter 4, the NPU 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 Product Form and by Application, with sales market share and growth rate by Product Form, 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 NPU Chip market forecast, by regions, by Product Form, 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 NPU Chip.

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

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