

Global RISC-V-based AI Accelerator SoC 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 RISC-V-based AI Accelerator SoC market size was valued at US\$ 432 million in 2025 and is forecast to a readjusted size of US\$ 3451 million by 2032 with a CAGR of 30.5% during review period.

A RISC-V-based AI Accelerator SoC refers to a system-on-chip, accelerator silicon, or heterogeneous processor that uses the RISC-V instruction set architecture as a general-purpose processing core, control core, vector processing element, matrix/tensor execution interface, or programmable scheduling engine, and integrates dedicated AI acceleration resources such as an NPU, CNN accelerator, KPU, DSP/VPU, vector extension, custom AI instruction extensions, on-chip SRAM, power-management logic, and high-speed on-chip interconnects. The product is designed to execute AI inference and related workloads locally across edge vision, audio intelligence, sensor fusion, robotics, automotive intelligence, telecom network intelligence, edge servers, and data-center inference. This study focuses on chip-level products and silicon platforms with explicit AI acceleration capability and a meaningful RISC-V architectural role.

Based on our research, the RISC-V-based AI Accelerator SoC market is still an emerging and heterogeneous segment rather than a mature single-product category. Its core value does not come from replacing all existing AI chips, but from enabling highly customized, energy-efficient, and workload-specific silicon designs where an open and extensible ISA matters. The product boundary should therefore be drawn narrowly around chip-level products that combine a meaningful RISC-V architectural role with explicit AI acceleration capability, such as a RISC-V CPU plus NPU SoC, a RISC-V AI MCU, a many-core RISC-V inference chip, a RISC-V AI CPU, or a RISC-V-controlled

chiplet AI accelerator. This boundary is important because the broader ecosystem includes many RISC-V CPU IP vendors, development boards, modules, and Arm-based AI SoCs that are relevant to adoption but should not be counted as RISC-V AI Accelerator SoC revenue.

Demand in 2025 is still concentrated in low-power edge inference, AIoT, machine vision, hearables, embedded sensing, and small-scale engineering deployments. The 2026-2032 growth path depends on whether RISC-V-based AI chips can gain design wins in automotive AI, robotics, O-RAN, edge LLM devices, industrial intelligence, and power-efficient server inference. The addressable opportunity is real, but the adoption curve will be constrained by software maturity, model deployment tools, compiler quality, customer qualification cycles, and the ability to offer reliable reference designs. For this reason, the market should be forecast conservatively: RISC-V AI SoCs are likely to expand in specialized and power-sensitive applications first, rather than immediately displacing GPUs or mainstream Arm-based edge AI SoCs.

From a product roadmap and architecture perspective, RISC-V-based AI Accelerator SoCs are evolving from simple RISC-V CPU + lightweight CNN accelerator designs toward more heterogeneous architectures that combine RISC-V control cores, vector extensions, tensor or matrix engines, dedicated NPUs, on-chip memory, and increasingly chiplet-based integration. Early commercial products were mainly optimized for low-power vision, audio, and AIoT inference, while newer platforms are expanding toward edge LLM inference, robotics, telecom AI, automotive intelligence, and data-center-class power-efficient acceleration. This evolution suggests that the industry's competitive focus is shifting from basic RISC-V adoption to system-level AI performance, software toolchains, model deployment efficiency, memory bandwidth, and workload-specific customization. Companies with stronger compiler support, quantization tools, reference designs, and ecosystem partnerships are likely to gain a more durable position than vendors that only offer standalone silicon specifications.

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

Global RISC-V-based AI Accelerator SoC 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 RISC-V-based AI Accelerator SoC 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 RISC-V-based AI Accelerator SoC 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 RISC-V-based AI Accelerator SoC

- 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 RISC-V-based AI Accelerator SoC 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 NXP Semiconductors N.V., Analog Devices, Inc., Alibaba Group Holding Limited, Tenstorrent Inc., Axelera AI B.V., Canaan Inc., Beijing ESWIN Computing Technology Co., Ltd., SOPHGO Technologies Ltd., EdgeQ Inc., SpacemiT Hangzhou Technology Co., Ltd., etc.

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

Market Segmentation

RISC-V-based AI Accelerator SoC 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

RISC-V Edge AI SoC

RISC-V Application AI SoC

Other

Market segment by Performance Class

Ultra-low Performance Class

Low Performance Class

Mid Performance Class

High Performance Class

Very High Performance Class

Market segment by Numeric Precision

INT8 Precision

INT4 / Sub-8-bit Precision

FP16 / BF16 Precision

FP8 Precision

Other

Market segment by Compute Architecture

RISC-V Vector Architecture

RISC-V Tensor / Matrix Architecture

Other

Market segment by Application

Consumer Electronics

Smart Home

Industrial Automation

Healthcare Devices

Energy & Utilities

Data Center & Edge Server

Other

Major players covered

NXP Semiconductors N.V.

Analog Devices, Inc.

Alibaba Group Holding Limited

Tenstorrent Inc.

Axelera AI B.V.

Canaan Inc.

Beijing ESWIN Computing Technology Co., Ltd.

SOPHGO Technologies Ltd.

EdgeQ Inc.

SpacemiT Hangzhou Technology Co., Ltd.

GreenWaves Technologies

Suzhou China Core Microelectronics Co., Ltd.

BOS Semiconductors Co., Ltd.

Esperanto Technologies, Inc.

Kneron, 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 RISC-V-based AI Accelerator SoC product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of RISC-V-based AI Accelerator SoC, with price, sales quantity, revenue, and global market share of RISC-V-based AI Accelerator SoC from 2021 to 2026.

Chapter 3, the RISC-V-based AI Accelerator SoC competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the RISC-V-based AI Accelerator SoC 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 RISC-V-based AI Accelerator SoC 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 RISC-V-based AI Accelerator SoC.

Chapter 14 and 15, to describe RISC-V-based AI Accelerator SoC sales channel, distributors, customers, research findings and conclusion.

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