

Global Robotic AI Vision 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 Robotic AI Vision Chip market size was valued at US\$ 952 million in 2025 and is forecast to a readjusted size of US\$ 2727 million by 2032 with a CAGR of 16.0% during review period.

Robotic AI vision chips are application-specific integrated circuits (ASICs/SoCs) designed for edge computing scenarios in robotics and optimized specifically for visual perception and AI inference. They integrate high-performance ISPs (image signal processors), dedicated NPUs (neural network processors), video codecs, and multi-core CPUs, enabling real-time image acquisition, feature extraction, object detection / tracking, scene understanding, pose estimation, and obstacle avoidance planning, supporting the ?vision-cognition-action? closed-loop for service robots, industrial robots, humanoid robots, and others. Key performance metrics include TOPS computing power, power consumption, latency, frame rate, and visual accuracy. The chip must be compatible with multi-sensor fusion (2D/3D vision), low-power edge deployment, and real-time requirements.

By 2025, global sales of robotics AI vision chips will reach 43.03 million units, with an average price of \$21.51 per unit.

Development Trends

Dual Improvement in Computing Power and Energy Efficiency

Evolving from entry-level 5?10 TOPS to mid-range 20?100 TOPS and **150 TOPS+** high-end models, supporting large models (?2B parameters) and multimodal perception.

Process technology is iterating toward 7nm and below, with energy efficiency improving to over 10 TOPS/W, making them suitable for battery-powered robots.

Technology Roadmap Iteration

Mainstream: ISP+NPU heterogeneous SoCs (Horizon Robotics, Black Sesame, Starry, etc.); High-end: CPU+GPU+NPU convergence (NVIDIA Jetson Thor).

3D vision (ToF / structured light) and multi-sensor fusion (vision + LiDAR + IMU) become standard features in mid-to-high-end models.

Technologies such as mercury-free UV-LED lighting, low-light enhancement, and AI-based noise reduction improve robustness in complex environments.

Expansion of Application Scenarios

Service robots (vacuuming, delivery, companionship) are rapidly gaining market penetration; industrial robots (inspection, assembly, sorting) are upgrading to higher precision and speed; humanoid robots are entering the early stages of mass production.

Policy and Industry Drivers: Embodied intelligence, smart manufacturing, and the silver economy are driving demand, while domestic substitution is accelerating.

Evolution of the Competitive Landscape

European and American companies (NVIDIA, Ambarella, TI) dominate high-end computing power and ecosystems; Chinese companies (Horizon Robotics, StarChase, Fuhuan Micro) are rapidly gaining ground in the mid-to-low-end market with cost-effective solutions and localized applications.

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

Global Robotic AI Vision Chip 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 Robotic AI Vision Chip 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 Robotic AI Vision Chip 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 Robotic AI Vision 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 Robotic AI Vision 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 NVIDIA^{US}, Qualcomm^{US}, AMD^{US}, Renesas Electronics^{JP}, NXP Semiconductors^{NL}, Sony Semiconductor Solutions^{JP}, Ambarella^{US}, Rockchip^{CN}, Hailo^{IL}, Synaptics^{US}, etc.

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

Market Segmentation

Robotic AI Vision Chip 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

Low Computing Power (<10 TOPS)

Medium Computing Power (10-100 TOPS)

High Computing Power (>150 TOPS)

Market segment by Visual type

2D Vision

3D Vision

Multimodal Fusion

Market segment by Sales Channels

Direct Sales

Distribution

Market segment by Application

Service Robots

Industrial Robots

Humanoid Robots

Special-purpose Robots

Major players covered

NVIDIA?US?

Qualcomm?US?

AMD?US?

Renesas Electronics?JP?

NXP Semiconductors?NL?

Sony Semiconductor Solutions?JP?

Ambarella?US?

Rockchip?CN?

Hailo?IL?

Synaptics?US?

Cambricon?CN?

Axera?CN?

Socionext?JP?

Black Sesame Technologies ??????CN?

Axelera AI?NL?

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 Robotic AI Vision Chip product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Robotic AI Vision 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 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 Robotic AI Vision Chip 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 Robotic AI Vision Chip.

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

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