

Global Robotic AI Vision Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Robotic AI Vision Chip market size is expected to reach \$ 2727 million by 2032, rising at a market growth of 16.0% CAGR during the forecast period (2026-2032).

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 studies the global Robotic AI Vision Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Robotic AI Vision Chip 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 Robotic AI Vision Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Robotic AI Vision Chip total production and demand, 2021-2032, (Million Units)
Global Robotic AI Vision Chip total production value, 2021-2032, (USD Million)
Global Robotic AI Vision Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)
Global Robotic AI Vision Chip consumption by region & country, CAGR, 2021-2032 & (Million Units)
U.S. VS China: Robotic AI Vision Chip domestic production, consumption, key domestic manufacturers and share
Global Robotic AI Vision Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)
Global Robotic AI Vision Chip production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)
Global Robotic AI Vision Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Robotic AI Vision Chip 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^{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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Robotic AI Vision Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Units) and average price (US\$/Unit) by manufacturer, by Type, 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 Robotic AI Vision Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Robotic AI Vision Chip Market, Segmentation by Type:

Low Computing Power (<10 TOPS)

Medium Computing Power (10-100 TOPS)

High Computing Power (>150 TOPS)

Global Robotic AI Vision Chip Market, Segmentation by Visual type:

2D Vision

3D Vision

Multimodal Fusion

Global Robotic AI Vision Chip Market, Segmentation by Sales Channels:

Direct Sales

Distribution

Global Robotic AI Vision Chip Market, Segmentation by Application:

Service Robots

Industrial Robots

Humanoid Robots

Special-purpose Robots

Companies Profiled:

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?

Key Questions Answered:

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

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