

Global Unmanned Delivery Vehicle Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Unmanned Delivery Vehicle Chip market size is expected to reach \$ 1073 million by 2032, rising at a market growth of 23.6% CAGR during the forecast period (2026-2032).

Unmanned Delivery Vehicle Chip refers to semiconductor processing devices installed in autonomous delivery vehicles, sidewalk delivery robots, indoor and outdoor delivery robots, and autonomous delivery vans to perform environmental perception computing, artificial intelligence inference, multi-sensor fusion, localization and mapping, path planning, motion control, functional safety monitoring, and core in-vehicle data exchange. The market primarily covers autonomous driving SoCs, robotics processors, AI accelerators, control MCUs, and safety and gateway processors based on GPU, NPU/ASIC, CPU/MPU, or MCU architectures. Key specifications include AI computing performance, CPU capability, memory bandwidth, sensor input capacity, interface configuration, typical power consumption, operating temperature, functional safety capability, cybersecurity, and software compatibility. These chips operate with cameras, LiDAR, millimeter-wave radar, GNSS, IMUs, drive-by-wire chassis systems, and communication modules to support food and beverage delivery, parcel and express delivery, grocery and retail delivery, medical and institutional delivery, and industrial and park logistics.

Key Findings

Autonomous driving SoCs generate the largest share of market revenue

GPU-based and NPU/ASIC-based architectures dominate high-value computing

platforms

Low-power products lead unit demand while higher-power platforms carry greater value

Parcel, retail and food delivery form the principal application base

China represents the largest regional demand and manufacturing market

Market Trends

Unmanned Delivery Vehicle Chip products are evolving from development-oriented computing boards and general-purpose processors toward production-ready platforms combining perception acceleration, real-time control, safety monitoring, networking, and vehicle interfaces. GPU-based architectures retain an important position in advanced robotics because of their mature software ecosystems and broad model compatibility, while NPU/ASIC-based products are gaining adoption through higher computing efficiency and lower power consumption. CPU/MPU-based processors remain relevant for navigation, operating-system management, and medium-complexity applications, whereas MCUs continue to support deterministic chassis control and safety supervision. Product development increasingly emphasizes effective model performance rather than headline computing capability alone, with customers paying greater attention to memory bandwidth, sensor interfaces, thermal design, cybersecurity, functional safety, operating-system support, and long-term supply. The market is also moving toward differentiated power configurations, with compact robots favoring highly integrated low-power processors and road-going vehicles adopting higher-performance or multi-chip platforms.

Market Dynamics

Drivers

Market growth is driven by the expansion of instant retail, e-commerce fulfillment, parcel delivery, and labor-saving logistics services. As autonomous delivery vehicles move from controlled pilot projects toward fleet deployment, computing systems must process more cameras, LiDAR units, radar sensors, positioning data, and vehicle-control signals in real time. More complex operating environments are increasing demand for AI

inference, sensor fusion, path planning, functional safety, remote diagnostics, and over-the-air software upgrades. Continuous improvement in semiconductor integration and performance per watt is also allowing smaller delivery robots to adopt capabilities that previously required larger and more expensive computing systems. Official product and application programs from leading chip suppliers confirm that delivery robots, autonomous mobile robots, and goods-delivery vehicles have become established target applications for edge AI and autonomous-driving processors.

Restraints

Market expansion remains constrained by the uncertain commercial economics of autonomous delivery fleets. Vehicle utilization, order density, remote supervision, maintenance costs, road access, and local operating rules continue to affect downstream investment decisions. High-performance chips also increase the cost and complexity of memory, power supply, thermal management, circuit-board design, and software validation. Smaller vehicle manufacturers may continue using mature processors or simplified computing architectures when operating routes are fixed and perception requirements are limited. Long automotive and robotics development cycles, fragmented software environments, different sensor interfaces, and varying functional safety requirements make it difficult to transfer one hardware configuration directly across multiple vehicle platforms. Dependence on advanced semiconductor manufacturing and packaging capacity also creates potential supply-chain and geopolitical risks.

Opportunities

The most attractive opportunities are emerging in road-going low-speed delivery vehicles, autonomous delivery vans, and mixed indoor-outdoor robots that require higher computing performance and more complete safety redundancy. NPU/ASIC-based architectures have significant potential in cost-sensitive applications because they can provide higher AI performance per watt than general-purpose processors. Additional opportunities exist in integrated platforms that combine perception computing, real-time control, safety functions, networking, and software tools within a coordinated architecture. Regional supply-chain localization, particularly in China, is creating demand for domestically developed computing SoCs, robotics processors, and vehicle-control MCUs. Hospitals, campuses, factories, and industrial parks also provide accessible commercialization environments where routes and operating conditions can be more tightly managed than on public roads.

Challenges

The industry faces rapid algorithm evolution, short product-development cycles, intense price competition, and uncertainty over which computing architectures will become standard across different delivery platforms. Suppliers must ensure that new neural-network models can be deployed efficiently without compromising thermal limits, deterministic control, cybersecurity, or system reliability. Chip qualification and vehicle-level validation require substantial engineering resources, while customers expect long product lifecycles and stable software support. Large design wins may take several years to convert into revenue and remain dependent on downstream vehicle production and fleet deployment. Suppliers with limited software ecosystems, weak sensor compatibility, insufficient functional safety support, or restricted production capacity may find it difficult to compete for large-volume programs.

Industry Chain Analysis

The upstream industry chain includes semiconductor intellectual property, electronic design automation tools, CPU and accelerator architectures, wafer fabrication, advanced packaging, testing, substrates, memory interfaces, and automotive-grade manufacturing materials. Chip design companies define computing architecture, functional modules, interfaces, power management, safety mechanisms, and software development environments, while foundries and packaging providers determine process availability, yield, production capacity, and unit cost. Advanced autonomous-driving and AI processors require high-performance process nodes, complex packaging, high-speed memory access, and extensive verification, whereas control MCUs generally place greater emphasis on mature-process reliability, deterministic performance, integrated peripherals, and long-term supply.

The midstream segment covers chip design, firmware, drivers, operating-system adaptation, AI toolchains, reference designs, validation, and technical support. Downstream customers include unmanned delivery vehicle manufacturers, delivery robot developers, autonomous-driving system providers, domain-controller suppliers, logistics operators, retail platforms, and industrial automation companies. Value creation increasingly depends on the combination of hardware efficiency and software usability. Suppliers with mature development tools, optimized AI libraries, broad sensor support, functional safety capability, stable production, and vehicle-level engineering experience

generally achieve stronger customer retention than companies competing only on nominal computing performance.

Segment Insights

By chip function, autonomous driving SoCs represent the largest revenue segment because they perform the core perception, sensor-fusion, localization, planning, and decision-making workloads of road-going delivery vehicles. Robotics processors address a broader range of low- and medium-complexity platforms, particularly indoor and sidewalk delivery robots. AI accelerators are increasingly used to supplement main processors where customers require additional neural-network performance without replacing the entire computing platform. Control MCUs maintain a broad unit base because each vehicle requires deterministic management of motors, steering, braking, power systems, and peripheral devices. Safety and gateway processors represent a smaller but strategically important segment as vehicle architectures adopt stronger fault isolation, secure communications, and functional redundancy.

By computing architecture, GPU-based products remain important in high-performance platforms and development-intensive projects because of their software compatibility and flexible parallel-processing capabilities. NPU/ASIC-based products are expected to gain importance as customers prioritize AI performance per watt, system cost, and production scalability. CPU/MPU-based architectures remain widely used in navigation, human-machine interfaces, operating-system management, and medium-level AI applications, while MCU-based architectures dominate real-time control and safety functions. Because many modern SoCs integrate several computing units, market classification should follow the primary commercial architecture and workload rather than the presence of individual processor cores.

By typical power consumption, products rated at 10 watts or below serve compact indoor and sidewalk robots where battery life, heat dissipation, and enclosure size are critical. The above 10-30 watt range represents an important mainstream segment for robots requiring multi-camera perception, navigation, and local AI inference. Products above 30-60 watts are primarily used in road-going low-speed delivery vehicles with more sensors and more complex autonomous-driving functions. Platforms above 60 watts account for a smaller volume share but carry higher value and are mainly deployed in high-performance road vehicles, redundant computing systems, and autonomous delivery vans.

By application, parcel and express delivery represents a major source of demand because routes are repeatable, shipment frequency is high, and labor substitution can be measured directly. Grocery and retail delivery is expanding alongside instant commerce and community fulfillment, while food and beverage delivery supports substantial demand for smaller sidewalk and community robots. Medical and institutional delivery requires reliable scheduling, traceability, and controlled access, supporting demand in hospitals, campuses, and hotels. Industrial and park logistics provides a relatively stable application base because operating routes can be standardized and integrated with existing warehouse and production systems.

Downstream Market Opportunities

Parcel, retail, and food delivery are expected to remain the principal commercial markets, but the most reliable near-term deployments may occur in controlled or semi-controlled environments. Hospitals, campuses, hotels, factories, industrial parks, and large commercial facilities provide repeatable routes, predictable traffic patterns, and measurable labor-saving benefits. These environments allow vehicle developers to validate computing platforms, safety functions, and fleet-management systems before expanding to public-road operations. Road-going parcel and retail vehicles offer the highest potential chip value per vehicle because they require more sensors, higher AI performance, stronger cybersecurity, and greater functional redundancy. Medical supplies and industrial materials delivery also create opportunities for suppliers able to provide long product lifecycles, deterministic control, secure connectivity, and stable technical support.

Regional Insights

China is the largest regional demand market and the most active manufacturing and deployment base for Unmanned Delivery Vehicle Chip applications. Its advantages include a concentrated autonomous delivery vehicle supply chain, large e-commerce and instant-retail platforms, rapid product iteration, expanding local semiconductor capabilities, and strong demand for cost-effective road-going delivery vehicles. Domestic chip suppliers are increasing their participation through localized software tools, customer engineering support, competitive pricing, and faster adaptation to Chinese sensor and vehicle platforms. The market remains highly competitive, with international processors continuing to play an important role in advanced development and high-performance computing.

North America has a smaller vehicle-production base but strong positions in GPU computing, robotics platforms, edge AI software, and sidewalk delivery operations. Israel has differentiated capabilities in autonomous-driving SoCs and energy-efficient AI processing. Europe and Japan maintain important positions in automotive MCUs, safety processors, industrial reliability, and long-term supply, while South Korea and Taiwan contribute through edge AI processors, application SoCs, and semiconductor manufacturing ecosystems. Emerging markets in Southeast Asia, India, the Middle East, and Latin America are primarily downstream deployment and system-integration markets, although local logistics demand may create future opportunities for standardized low-power platforms.

Competitive Landscape Analysis

The competitive landscape consists of high-performance computing platform suppliers, autonomous-driving SoC developers, robotics processor companies, edge AI accelerator specialists, and established automotive MCU manufacturers. NVIDIA competes through its mature GPU computing ecosystem, AI development tools, and direct application in delivery robots. Horizon Robotics is strengthening its position in China through automotive-grade computing SoCs, localized software tools, and L4 logistics partnerships. Qualcomm combines heterogeneous computing, low-power processing, connectivity, and robotics-focused platforms, while Mobileye participates through integrated autonomous-driving systems for goods delivery. Texas Instruments, NXP Semiconductors, Renesas Electronics, Infineon Technologies, and STMicroelectronics provide differentiated capabilities in real-time control, functional safety, networking, and industrial reliability. Chinese suppliers such as Rockchip Electronics, SemiDrive, and Black Sesame Technologies compete through local support, cost efficiency, and adaptation to domestic vehicle platforms. Competition is shifting from nominal chip performance toward effective AI efficiency, software maturity, sensor compatibility, safety capability, production reliability, and lifecycle support.

Report Scope

This report studies the global Unmanned Delivery Vehicle Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Unmanned

Delivery Vehicle 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 Unmanned Delivery Vehicle Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Unmanned Delivery Vehicle Chip total production and demand, 2021-2032, (Million Units)

Global Unmanned Delivery Vehicle Chip total production value, 2021-2032, (USD Million)

Global Unmanned Delivery Vehicle Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Unmanned Delivery Vehicle Chip consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Unmanned Delivery Vehicle Chip domestic production, consumption, key domestic manufacturers and share

Global Unmanned Delivery Vehicle Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Unmanned Delivery Vehicle Chip production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Unmanned Delivery Vehicle Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Unmanned Delivery Vehicle 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, Horizon Robotics,

Qualcomm, Texas Instruments, NXP Semiconductors, Renesas Electronics, Mobileye, Ambarella, Rockchip Electronics, SemiDrive, 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 Unmanned Delivery Vehicle 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 Unmanned Delivery Vehicle Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Unmanned Delivery Vehicle Chip Supply, Demand and Key Producers, 2026-2032

Global Unmanned Delivery Vehicle Chip Market, Segmentation by Type:

Autonomous Driving SoC

Robotics Processor

AI Accelerator

Control MCU

Safety and Gateway Processor

Global Unmanned Delivery Vehicle Chip Market, Segmentation by Computing Architecture:

GPU-based

NPU/ASIC-based

Heterogeneous SoC

MCU/MPU-based

Global Unmanned Delivery Vehicle Chip Market, Segmentation by Typical Power Consumption:

?10 W

>10-30 W

>30-60 W

>60 W

Global Unmanned Delivery Vehicle Chip Market, Segmentation by Application:

Food and Beverage Delivery

Parcel and Express Delivery

Grocery and Retail Delivery

Medical and Institutional Delivery

Industrial and Park Logistics

Other

Companies Profiled:

NVIDIA

Horizon Robotics

Qualcomm

Texas Instruments

NXP Semiconductors

Renesas Electronics

Mobileye

Ambarella

Rockchip Electronics

SemiDrive

Black Sesame Technologies

Hailo

Infineon Technologies

STMicroelectronics

MediaTek

Microchip Technology

DEEPX

Key Questions Answered

1. How big is the global Unmanned Delivery Vehicle Chip market?
2. What is the demand of the global Unmanned Delivery Vehicle Chip market?
3. What is the year over year growth of the global Unmanned Delivery Vehicle Chip market?
4. What is the total value of the global Unmanned Delivery Vehicle Chip market?
5. Who are the Major Players in the global Unmanned Delivery Vehicle Chip market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Unmanned Delivery Vehicle Chip Introduction
- 1.2 World Unmanned Delivery Vehicle Chip Supply & Forecast
 - 1.2.1 World Unmanned Delivery Vehicle Chip Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Unmanned Delivery Vehicle Chip Production (2021-2032)
 - 1.2.3 World Unmanned Delivery Vehicle Chip Pricing Trends (2021-2032)
- 1.3 World Unmanned Delivery Vehicle Chip Production by Region (Based on Production Site)
 - 1.3.1 World Unmanned Delivery Vehicle Chip Production Value by Region (2021-2032)
 - 1.3.2 World Unmanned Delivery Vehicle Chip Production by Region (2021-2032)
 - 1.3.3 World Unmanned Delivery Vehicle Chip Average Price by Region (2021-2032)
 - 1.3.4 North America Unmanned Delivery Vehicle Chip Production (2021-2032)
 - 1.3.5 Europe Unmanned Delivery Vehicle Chip Production (2021-2032)
 - 1.3.6 China Unmanned Delivery Vehicle Chip Production (2021-2032)
 - 1.3.7 Japan Unmanned Delivery Vehicle Chip Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Unmanned Delivery Vehicle Chip Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Unmanned Delivery Vehicle Chip Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Unmanned Delivery Vehicle Chip Demand (2021-2032)
- 2.2 World Unmanned Delivery Vehicle Chip Consumption by Region
 - 2.2.1 World Unmanned Delivery Vehicle Chip Consumption by Region (2021-2026)
 - 2.2.2 World Unmanned Delivery Vehicle Chip Consumption Forecast by Region (2027-2032)
- 2.3 United States Unmanned Delivery Vehicle Chip Consumption (2021-2032)
- 2.4 China Unmanned Delivery Vehicle Chip Consumption (2021-2032)
- 2.5 Europe Unmanned Delivery Vehicle Chip Consumption (2021-2032)
- 2.6 Japan Unmanned Delivery Vehicle Chip Consumption (2021-2032)
- 2.7 South Korea Unmanned Delivery Vehicle Chip Consumption (2021-2032)
- 2.8 ASEAN Unmanned Delivery Vehicle Chip Consumption (2021-2032)
- 2.9 India Unmanned Delivery Vehicle Chip Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Unmanned Delivery Vehicle Chip Production Value by Manufacturer (2021-2026)

3.2 World Unmanned Delivery Vehicle Chip Production by Manufacturer (2021-2026)

3.3 World Unmanned Delivery Vehicle Chip Average Price by Manufacturer (2021-2026)

3.4 Unmanned Delivery Vehicle Chip Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Unmanned Delivery Vehicle Chip Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Unmanned Delivery Vehicle Chip in 2025

3.5.3 Global Concentration Ratios (CR8) for Unmanned Delivery Vehicle Chip in 2025

3.6 Unmanned Delivery Vehicle Chip Market: Overall Company Footprint Analysis

3.6.1 Unmanned Delivery Vehicle Chip Market: Region Footprint

3.6.2 Unmanned Delivery Vehicle Chip Market: Company Product Type Footprint

3.6.3 Unmanned Delivery Vehicle Chip Market: Company Product Application

Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Unmanned Delivery Vehicle Chip Production Value Comparison

4.1.1 United States VS China: Unmanned Delivery Vehicle Chip Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Unmanned Delivery Vehicle Chip Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Unmanned Delivery Vehicle Chip Production Comparison

4.2.1 United States VS China: Unmanned Delivery Vehicle Chip Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Unmanned Delivery Vehicle Chip Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Unmanned Delivery Vehicle Chip Consumption Comparison

4.3.1 United States VS China: Unmanned Delivery Vehicle Chip Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Unmanned Delivery Vehicle Chip Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Unmanned Delivery Vehicle Chip Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Unmanned Delivery Vehicle Chip Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Unmanned Delivery Vehicle Chip Production Value (2021-2026)

4.4.3 United States Based Manufacturers Unmanned Delivery Vehicle Chip Production (2021-2026)

4.5 China Based Unmanned Delivery Vehicle Chip Manufacturers and Market Share

4.5.1 China Based Unmanned Delivery Vehicle Chip Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Unmanned Delivery Vehicle Chip Production Value (2021-2026)

4.5.3 China Based Manufacturers Unmanned Delivery Vehicle Chip Production (2021-2026)

4.6 Rest of World Based Unmanned Delivery Vehicle Chip Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Unmanned Delivery Vehicle Chip Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Unmanned Delivery Vehicle Chip Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Unmanned Delivery Vehicle Chip Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Unmanned Delivery Vehicle Chip Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Autonomous Driving SoC

5.2.2 Robotics Processor

5.2.3 AI Accelerator

5.2.4 Control MCU

5.2.5 Safety and Gateway Processor

5.3 Market Segment by Type

- 5.3.1 World Unmanned Delivery Vehicle Chip Production by Type (2021-2032)
- 5.3.2 World Unmanned Delivery Vehicle Chip Production Value by Type (2021-2032)
- 5.3.3 World Unmanned Delivery Vehicle Chip Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY COMPUTING ARCHITECTURE

- 6.1 World Unmanned Delivery Vehicle Chip Market Size Overview by Computing Architecture: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Computing Architecture
 - 6.2.1 GPU-based
 - 6.2.2 NPU/ASIC-based
 - 6.2.3 Heterogeneous SoC
 - 6.2.4 MCU/MPU-based
- 6.3 Market Segment by Computing Architecture
 - 6.3.1 World Unmanned Delivery Vehicle Chip Production by Computing Architecture (2021-2032)
 - 6.3.2 World Unmanned Delivery Vehicle Chip Production Value by Computing Architecture (2021-2032)
 - 6.3.3 World Unmanned Delivery Vehicle Chip Average Price by Computing Architecture (2021-2032)

7 MARKET ANALYSIS BY TYPICAL POWER CONSUMPTION

- 7.1 World Unmanned Delivery Vehicle Chip Market Size Overview by Typical Power Consumption: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Typical Power Consumption
 - 7.2.1 ?10 W
 - 7.2.2 >10-30 W
 - 7.2.3 >30-60 W
 - 7.2.4 >60 W
- 7.3 Market Segment by Typical Power Consumption
 - 7.3.1 World Unmanned Delivery Vehicle Chip Production by Typical Power Consumption (2021-2032)
 - 7.3.2 World Unmanned Delivery Vehicle Chip Production Value by Typical Power Consumption (2021-2032)
 - 7.3.3 World Unmanned Delivery Vehicle Chip Average Price by Typical Power Consumption (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Unmanned Delivery Vehicle Chip Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Food and Beverage Delivery

8.2.2 Parcel and Express Delivery

8.2.3 Grocery and Retail Delivery

8.2.4 Medical and Institutional Delivery

8.2.5 Industrial and Park Logistics

8.2.6 Other

8.3 Market Segment by Application

8.3.1 World Unmanned Delivery Vehicle Chip Production by Application (2021-2032)

8.3.2 World Unmanned Delivery Vehicle Chip Production Value by Application (2021-2032)

8.3.3 World Unmanned Delivery Vehicle Chip Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 NVIDIA

9.1.1 NVIDIA Details

9.1.2 NVIDIA Major Business

9.1.3 NVIDIA Unmanned Delivery Vehicle Chip Product and Services

9.1.4 NVIDIA Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 NVIDIA Recent Developments/Updates

9.1.6 NVIDIA Competitive Strengths & Weaknesses

9.2 Horizon Robotics

9.2.1 Horizon Robotics Details

9.2.2 Horizon Robotics Major Business

9.2.3 Horizon Robotics Unmanned Delivery Vehicle Chip Product and Services

9.2.4 Horizon Robotics Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Horizon Robotics Recent Developments/Updates

9.2.6 Horizon Robotics Competitive Strengths & Weaknesses

9.3 Qualcomm

9.3.1 Qualcomm Details

9.3.2 Qualcomm Major Business

9.3.3 Qualcomm Unmanned Delivery Vehicle Chip Product and Services

9.3.4 Qualcomm Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Qualcomm Recent Developments/Updates

9.3.6 Qualcomm Competitive Strengths & Weaknesses

9.4 Texas Instruments

9.4.1 Texas Instruments Details

9.4.2 Texas Instruments Major Business

9.4.3 Texas Instruments Unmanned Delivery Vehicle Chip Product and Services

9.4.4 Texas Instruments Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Texas Instruments Recent Developments/Updates

9.4.6 Texas Instruments Competitive Strengths & Weaknesses

9.5 NXP Semiconductors

9.5.1 NXP Semiconductors Details

9.5.2 NXP Semiconductors Major Business

9.5.3 NXP Semiconductors Unmanned Delivery Vehicle Chip Product and Services

9.5.4 NXP Semiconductors Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 NXP Semiconductors Recent Developments/Updates

9.5.6 NXP Semiconductors Competitive Strengths & Weaknesses

9.6 Renesas Electronics

9.6.1 Renesas Electronics Details

9.6.2 Renesas Electronics Major Business

9.6.3 Renesas Electronics Unmanned Delivery Vehicle Chip Product and Services

9.6.4 Renesas Electronics Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Renesas Electronics Recent Developments/Updates

9.6.6 Renesas Electronics Competitive Strengths & Weaknesses

9.7 Mobileye

9.7.1 Mobileye Details

9.7.2 Mobileye Major Business

9.7.3 Mobileye Unmanned Delivery Vehicle Chip Product and Services

9.7.4 Mobileye Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Mobileye Recent Developments/Updates

9.7.6 Mobileye Competitive Strengths & Weaknesses

9.8 Ambarella

9.8.1 Ambarella Details

9.8.2 Ambarella Major Business

- 9.8.3 Ambarella Unmanned Delivery Vehicle Chip Product and Services
- 9.8.4 Ambarella Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.8.5 Ambarella Recent Developments/Updates
- 9.8.6 Ambarella Competitive Strengths & Weaknesses
- 9.9 Rockchip Electronics
 - 9.9.1 Rockchip Electronics Details
 - 9.9.2 Rockchip Electronics Major Business
 - 9.9.3 Rockchip Electronics Unmanned Delivery Vehicle Chip Product and Services
 - 9.9.4 Rockchip Electronics Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Rockchip Electronics Recent Developments/Updates
 - 9.9.6 Rockchip Electronics Competitive Strengths & Weaknesses
- 9.10 SemiDrive
 - 9.10.1 SemiDrive Details
 - 9.10.2 SemiDrive Major Business
 - 9.10.3 SemiDrive Unmanned Delivery Vehicle Chip Product and Services
 - 9.10.4 SemiDrive Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 SemiDrive Recent Developments/Updates
 - 9.10.6 SemiDrive Competitive Strengths & Weaknesses
- 9.11 Black Sesame Technologies
 - 9.11.1 Black Sesame Technologies Details
 - 9.11.2 Black Sesame Technologies Major Business
 - 9.11.3 Black Sesame Technologies Unmanned Delivery Vehicle Chip Product and Services
 - 9.11.4 Black Sesame Technologies Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Black Sesame Technologies Recent Developments/Updates
 - 9.11.6 Black Sesame Technologies Competitive Strengths & Weaknesses
- 9.12 Hailo
 - 9.12.1 Hailo Details
 - 9.12.2 Hailo Major Business
 - 9.12.3 Hailo Unmanned Delivery Vehicle Chip Product and Services
 - 9.12.4 Hailo Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Hailo Recent Developments/Updates
 - 9.12.6 Hailo Competitive Strengths & Weaknesses
- 9.13 Infineon Technologies

- 9.13.1 Infineon Technologies Details
- 9.13.2 Infineon Technologies Major Business
- 9.13.3 Infineon Technologies Unmanned Delivery Vehicle Chip Product and Services
- 9.13.4 Infineon Technologies Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.13.5 Infineon Technologies Recent Developments/Updates
- 9.13.6 Infineon Technologies Competitive Strengths & Weaknesses
- 9.14 STMicroelectronics
 - 9.14.1 STMicroelectronics Details
 - 9.14.2 STMicroelectronics Major Business
 - 9.14.3 STMicroelectronics Unmanned Delivery Vehicle Chip Product and Services
 - 9.14.4 STMicroelectronics Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 STMicroelectronics Recent Developments/Updates
 - 9.14.6 STMicroelectronics Competitive Strengths & Weaknesses
- 9.15 MediaTek
 - 9.15.1 MediaTek Details
 - 9.15.2 MediaTek Major Business
 - 9.15.3 MediaTek Unmanned Delivery Vehicle Chip Product and Services
 - 9.15.4 MediaTek Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 MediaTek Recent Developments/Updates
 - 9.15.6 MediaTek Competitive Strengths & Weaknesses
- 9.16 Microchip Technology
 - 9.16.1 Microchip Technology Details
 - 9.16.2 Microchip Technology Major Business
 - 9.16.3 Microchip Technology Unmanned Delivery Vehicle Chip Product and Services
 - 9.16.4 Microchip Technology Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Microchip Technology Recent Developments/Updates
 - 9.16.6 Microchip Technology Competitive Strengths & Weaknesses
- 9.17 DEEPX
 - 9.17.1 DEEPX Details
 - 9.17.2 DEEPX Major Business
 - 9.17.3 DEEPX Unmanned Delivery Vehicle Chip Product and Services
 - 9.17.4 DEEPX Unmanned Delivery Vehicle Chip Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.17.5 DEEPX Recent Developments/Updates
 - 9.17.6 DEEPX Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Unmanned Delivery Vehicle Chip Industry Chain
- 10.2 Unmanned Delivery Vehicle Chip Upstream Analysis
 - 10.2.1 Unmanned Delivery Vehicle Chip Core Raw Materials
 - 10.2.2 Main Manufacturers of Unmanned Delivery Vehicle Chip Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Unmanned Delivery Vehicle Chip Production Mode
- 10.6 Unmanned Delivery Vehicle Chip Procurement Model
- 10.7 Unmanned Delivery Vehicle Chip Industry Sales Model and Sales Channels
 - 10.7.1 Unmanned Delivery Vehicle Chip Sales Model
 - 10.7.2 Unmanned Delivery Vehicle Chip Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Unmanned Delivery Vehicle Chip Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Unmanned Delivery Vehicle Chip Production Value by Region (2021-2026) & (USD Million)

Table 3. World Unmanned Delivery Vehicle Chip Production Value by Region (2027-2032) & (USD Million)

Table 4. World Unmanned Delivery Vehicle Chip Production Value Market Share by Region (2021-2026)

Table 5. World Unmanned Delivery Vehicle Chip Production Value Market Share by Region (2027-2032)

Table 6. World Unmanned Delivery Vehicle Chip Production by Region (2021-2026) & (Million Units)

Table 7. World Unmanned Delivery Vehicle Chip Production by Region (2027-2032) & (Million Units)

Table 8. World Unmanned Delivery Vehicle Chip Production Market Share by Region (2021-2026)

Table 9. World Unmanned Delivery Vehicle Chip Production Market Share by Region (2027-2032)

Table 10. World Unmanned Delivery Vehicle Chip Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Unmanned Delivery Vehicle Chip Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Unmanned Delivery Vehicle Chip Major Market Trends

Table 13. World Unmanned Delivery Vehicle Chip Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Million Units)

Table 14. World Unmanned Delivery Vehicle Chip Consumption by Region (2021-2026) & (Million Units)

Table 15. World Unmanned Delivery Vehicle Chip Consumption Forecast by Region (2027-2032) & (Million Units)

Table 16. World Unmanned Delivery Vehicle Chip Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Unmanned Delivery Vehicle Chip Producers in 2025

Table 18. World Unmanned Delivery Vehicle Chip Production by Manufacturer (2021-2026) & (Million Units)

Table 19. Production Market Share of Key Unmanned Delivery Vehicle Chip Producers in 2025

Table 20. World Unmanned Delivery Vehicle Chip Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Unmanned Delivery Vehicle Chip Company Evaluation Quadrant

Table 22. World Unmanned Delivery Vehicle Chip Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Unmanned Delivery Vehicle Chip Production Site of Key Manufacturer

Table 24. Unmanned Delivery Vehicle Chip Market: Company Product Type Footprint

Table 25. Unmanned Delivery Vehicle Chip Market: Company Product Application Footprint

Table 26. Unmanned Delivery Vehicle Chip Competitive Factors

Table 27. Unmanned Delivery Vehicle Chip New Entrant and Capacity Expansion Plans

Table 28. Unmanned Delivery Vehicle Chip Mergers & Acquisitions Activity

Table 29. United States VS China Unmanned Delivery Vehicle Chip Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Unmanned Delivery Vehicle Chip Production Comparison, (2021 & 2025 & 2032) & (Million Units)

Table 31. United States VS China Unmanned Delivery Vehicle Chip Consumption Comparison, (2021 & 2025 & 2032) & (Million Units)

Table 32. United States Based Unmanned Delivery Vehicle Chip Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Unmanned Delivery Vehicle Chip Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Unmanned Delivery Vehicle Chip Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Unmanned Delivery Vehicle Chip Production (2021-2026) & (Million Units)

Table 36. United States Based Manufacturers Unmanned Delivery Vehicle Chip Production Market Share (2021-2026)

Table 37. China Based Unmanned Delivery Vehicle Chip Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Unmanned Delivery Vehicle Chip Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Unmanned Delivery Vehicle Chip Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Unmanned Delivery Vehicle Chip Production, (2021-2026) & (Million Units)

Table 41. China Based Manufacturers Unmanned Delivery Vehicle Chip Production Market Share (2021-2026)

Table 42. Rest of World Based Unmanned Delivery Vehicle Chip Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Unmanned Delivery Vehicle Chip Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Unmanned Delivery Vehicle Chip Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Unmanned Delivery Vehicle Chip Production, (2021-2026) & (Million Units)

Table 46. Rest of World Based Manufacturers Unmanned Delivery Vehicle Chip Production Market Share (2021-2026)

Table 47. World Unmanned Delivery Vehicle Chip Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Unmanned Delivery Vehicle Chip Production by Type (2021-2026) & (Million Units)

Table 49. World Unmanned Delivery Vehicle Chip Production by Type (2027-2032) & (Million Units)

Table 50. World Unmanned Delivery Vehicle Chip Production Value by Type (2021-2026) & (USD Million)

Table 51. World Unmanned Delivery Vehicle Chip Production Value by Type (2027-2032) & (USD Million)

Table 52. World Unmanned Delivery Vehicle Chip Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Unmanned Delivery Vehicle Chip Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Unmanned Delivery Vehicle Chip Production Value by Computing Architecture, (USD Million), 2021 & 2025 & 2032

Table 55. World Unmanned Delivery Vehicle Chip Production by Computing Architecture (2021-2026) & (Million Units)

Table 56. World Unmanned Delivery Vehicle Chip Production by Computing Architecture (2027-2032) & (Million Units)

Table 57. World Unmanned Delivery Vehicle Chip Production Value by Computing Architecture (2021-2026) & (USD Million)

Table 58. World Unmanned Delivery Vehicle Chip Production Value by Computing Architecture (2027-2032) & (USD Million)

Table 59. World Unmanned Delivery Vehicle Chip Average Price by Computing Architecture (2021-2026) & (US\$/Unit)

Table 60. World Unmanned Delivery Vehicle Chip Average Price by Computing

Architecture (2027-2032) & (US\$/Unit)

Table 61. World Unmanned Delivery Vehicle Chip Production Value by Typical Power Consumption, (USD Million), 2021 & 2025 & 2032

Table 62. World Unmanned Delivery Vehicle Chip Production by Typical Power Consumption (2021-2026) & (Million Units)

Table 63. World Unmanned Delivery Vehicle Chip Production by Typical Power Consumption (2027-2032) & (Million Units)

Table 64. World Unmanned Delivery Vehicle Chip Production Value by Typical Power Consumption (2021-2026) & (USD Million)

Table 65. World Unmanned Delivery Vehicle Chip Production Value by Typical Power Consumption (2027-2032) & (USD Million)

Table 66. World Unmanned Delivery Vehicle Chip Average Price by Typical Power Consumption (2021-2026) & (US\$/Unit)

Table 67. World Unmanned Delivery Vehicle Chip Average Price by Typical Power Consumption (2027-2032) & (US\$/Unit)

Table 68. World Unmanned Delivery Vehicle Chip Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Unmanned Delivery Vehicle Chip Production by Application (2021-2026) & (Million Units)

Table 70. World Unmanned Delivery Vehicle Chip Production by Application (2027-2032) & (Million Units)

Table 71. World Unmanned Delivery Vehicle Chip Production Value by Application (2021-2026) & (USD Million)

Table 72. World Unmanned Delivery Vehicle Chip Production Value by Application (2027-2032) & (USD Million)

Table 73. World Unmanned Delivery Vehicle Chip Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Unmanned Delivery Vehicle Chip Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. NVIDIA Basic Information, Manufacturing Base and Competitors

Table 76. NVIDIA Major Business

Table 77. NVIDIA Unmanned Delivery Vehicle Chip Product and Services

Table 78. NVIDIA Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. NVIDIA Recent Developments/Updates

Table 80. NVIDIA Competitive Strengths & Weaknesses

Table 81. Horizon Robotics Basic Information, Manufacturing Base and Competitors

Table 82. Horizon Robotics Major Business

Table 83. Horizon Robotics Unmanned Delivery Vehicle Chip Product and Services

Table 84. Horizon Robotics Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Horizon Robotics Recent Developments/Updates

Table 86. Horizon Robotics Competitive Strengths & Weaknesses

Table 87. Qualcomm Basic Information, Manufacturing Base and Competitors

Table 88. Qualcomm Major Business

Table 89. Qualcomm Unmanned Delivery Vehicle Chip Product and Services

Table 90. Qualcomm Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Qualcomm Recent Developments/Updates

Table 92. Qualcomm Competitive Strengths & Weaknesses

Table 93. Texas Instruments Basic Information, Manufacturing Base and Competitors

Table 94. Texas Instruments Major Business

Table 95. Texas Instruments Unmanned Delivery Vehicle Chip Product and Services

Table 96. Texas Instruments Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Texas Instruments Recent Developments/Updates

Table 98. Texas Instruments Competitive Strengths & Weaknesses

Table 99. NXP Semiconductors Basic Information, Manufacturing Base and Competitors

Table 100. NXP Semiconductors Major Business

Table 101. NXP Semiconductors Unmanned Delivery Vehicle Chip Product and Services

Table 102. NXP Semiconductors Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. NXP Semiconductors Recent Developments/Updates

Table 104. NXP Semiconductors Competitive Strengths & Weaknesses

Table 105. Renesas Electronics Basic Information, Manufacturing Base and Competitors

Table 106. Renesas Electronics Major Business

Table 107. Renesas Electronics Unmanned Delivery Vehicle Chip Product and Services

Table 108. Renesas Electronics Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Renesas Electronics Recent Developments/Updates
Table 110. Renesas Electronics Competitive Strengths & Weaknesses
Table 111. Mobileye Basic Information, Manufacturing Base and Competitors
Table 112. Mobileye Major Business
Table 113. Mobileye Unmanned Delivery Vehicle Chip Product and Services
Table 114. Mobileye Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Mobileye Recent Developments/Updates
Table 116. Mobileye Competitive Strengths & Weaknesses
Table 117. Ambarella Basic Information, Manufacturing Base and Competitors
Table 118. Ambarella Major Business
Table 119. Ambarella Unmanned Delivery Vehicle Chip Product and Services
Table 120. Ambarella Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Ambarella Recent Developments/Updates
Table 122. Ambarella Competitive Strengths & Weaknesses
Table 123. Rockchip Electronics Basic Information, Manufacturing Base and Competitors
Table 124. Rockchip Electronics Major Business
Table 125. Rockchip Electronics Unmanned Delivery Vehicle Chip Product and Services
Table 126. Rockchip Electronics Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Rockchip Electronics Recent Developments/Updates
Table 128. Rockchip Electronics Competitive Strengths & Weaknesses
Table 129. SemiDrive Basic Information, Manufacturing Base and Competitors
Table 130. SemiDrive Major Business
Table 131. SemiDrive Unmanned Delivery Vehicle Chip Product and Services
Table 132. SemiDrive Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. SemiDrive Recent Developments/Updates
Table 134. SemiDrive Competitive Strengths & Weaknesses
Table 135. Black Sesame Technologies Basic Information, Manufacturing Base and Competitors
Table 136. Black Sesame Technologies Major Business

Table 137. Black Sesame Technologies Unmanned Delivery Vehicle Chip Product and Services

Table 138. Black Sesame Technologies Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Black Sesame Technologies Recent Developments/Updates

Table 140. Black Sesame Technologies Competitive Strengths & Weaknesses

Table 141. Hailo Basic Information, Manufacturing Base and Competitors

Table 142. Hailo Major Business

Table 143. Hailo Unmanned Delivery Vehicle Chip Product and Services

Table 144. Hailo Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Hailo Recent Developments/Updates

Table 146. Hailo Competitive Strengths & Weaknesses

Table 147. Infineon Technologies Basic Information, Manufacturing Base and Competitors

Table 148. Infineon Technologies Major Business

Table 149. Infineon Technologies Unmanned Delivery Vehicle Chip Product and Services

Table 150. Infineon Technologies Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Infineon Technologies Recent Developments/Updates

Table 152. Infineon Technologies Competitive Strengths & Weaknesses

Table 153. STMicroelectronics Basic Information, Manufacturing Base and Competitors

Table 154. STMicroelectronics Major Business

Table 155. STMicroelectronics Unmanned Delivery Vehicle Chip Product and Services

Table 156. STMicroelectronics Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. STMicroelectronics Recent Developments/Updates

Table 158. STMicroelectronics Competitive Strengths & Weaknesses

Table 159. MediaTek Basic Information, Manufacturing Base and Competitors

Table 160. MediaTek Major Business

Table 161. MediaTek Unmanned Delivery Vehicle Chip Product and Services

Table 162. MediaTek Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. MediaTek Recent Developments/Updates
Table 164. MediaTek Competitive Strengths & Weaknesses
Table 165. Microchip Technology Basic Information, Manufacturing Base and Competitors
Table 166. Microchip Technology Major Business
Table 167. Microchip Technology Unmanned Delivery Vehicle Chip Product and Services
Table 168. Microchip Technology Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. Microchip Technology Recent Developments/Updates
Table 170. Microchip Technology Competitive Strengths & Weaknesses
Table 171. DEEPX Basic Information, Manufacturing Base and Competitors
Table 172. DEEPX Major Business
Table 173. DEEPX Unmanned Delivery Vehicle Chip Product and Services
Table 174. DEEPX Unmanned Delivery Vehicle Chip Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. DEEPX Recent Developments/Updates
Table 176. DEEPX Competitive Strengths & Weaknesses
Table 177. Global Key Players of Unmanned Delivery Vehicle Chip Upstream (Raw Materials)
Table 178. Global Unmanned Delivery Vehicle Chip Typical Customers
Table 179. Unmanned Delivery Vehicle Chip Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Unmanned Delivery Vehicle Chip Picture

Figure 2. World Unmanned Delivery Vehicle Chip Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Unmanned Delivery Vehicle Chip Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Unmanned Delivery Vehicle Chip Production (2021-2032) & (Million Units)

Figure 5. World Unmanned Delivery Vehicle Chip Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Unmanned Delivery Vehicle Chip Production Value Market Share by Region (2021-2032)

Figure 7. World Unmanned Delivery Vehicle Chip Production Market Share by Region (2021-2032)

Figure 8. North America Unmanned Delivery Vehicle Chip Production (2021-2032) & (Million Units)

Figure 9. Europe Unmanned Delivery Vehicle Chip Production (2021-2032) & (Million Units)

Figure 10. China Unmanned Delivery Vehicle Chip Production (2021-2032) & (Million Units)

Figure 11. Japan Unmanned Delivery Vehicle Chip Production (2021-2032) & (Million Units)

Figure 12. Unmanned Delivery Vehicle Chip Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Unmanned Delivery Vehicle Chip Consumption (2021-2032) & (Million Units)

Figure 15. World Unmanned Delivery Vehicle Chip Consumption Market Share by Region (2021-2032)

Figure 16. United States Unmanned Delivery Vehicle Chip Consumption (2021-2032) & (Million Units)

Figure 17. China Unmanned Delivery Vehicle Chip Consumption (2021-2032) & (Million Units)

Figure 18. Europe Unmanned Delivery Vehicle Chip Consumption (2021-2032) & (Million Units)

Figure 19. Japan Unmanned Delivery Vehicle Chip Consumption (2021-2032) & (Million Units)

Figure 20. South Korea Unmanned Delivery Vehicle Chip Consumption (2021-2032) & (Million Units)

Figure 21. ASEAN Unmanned Delivery Vehicle Chip Consumption (2021-2032) & (Million Units)

Figure 22. India Unmanned Delivery Vehicle Chip Consumption (2021-2032) & (Million Units)

Figure 23. Producer Shipments of Unmanned Delivery Vehicle Chip by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Unmanned Delivery Vehicle Chip Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Unmanned Delivery Vehicle Chip Markets in 2025

Figure 26. United States VS China: Unmanned Delivery Vehicle Chip Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Unmanned Delivery Vehicle Chip Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Unmanned Delivery Vehicle Chip Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Unmanned Delivery Vehicle Chip Production Market Share 2025

Figure 30. China Based Manufacturers Unmanned Delivery Vehicle Chip Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Unmanned Delivery Vehicle Chip Production Market Share 2025

Figure 32. World Unmanned Delivery Vehicle Chip Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Unmanned Delivery Vehicle Chip Production Value Market Share by Type in 2025

Figure 34. Autonomous Driving SoC

Figure 35. Robotics Processor

Figure 36. AI Accelerator

Figure 37. Control MCU

Figure 38. Safety and Gateway Processor

Figure 39. World Unmanned Delivery Vehicle Chip Production Market Share by Type (2021-2032)

Figure 40. World Unmanned Delivery Vehicle Chip Production Value Market Share by Type (2021-2032)

Figure 41. World Unmanned Delivery Vehicle Chip Average Price by Type (2021-2032) & (US\$/Unit)

Figure 42. World Unmanned Delivery Vehicle Chip Production Value by Computing Architecture, (USD Million), 2021 & 2025 & 2032

Figure 43. World Unmanned Delivery Vehicle Chip Production Value Market Share by Computing Architecture in 2025

Figure 44. GPU-based

Figure 45. NPU/ASIC-based

Figure 46. Heterogeneous SoC

Figure 47. MCU/MPU-based

Figure 48. World Unmanned Delivery Vehicle Chip Production Market Share by Computing Architecture (2021-2032)

Figure 49. World Unmanned Delivery Vehicle Chip Production Value Market Share by Computing Architecture (2021-2032)

Figure 50. World Unmanned Delivery Vehicle Chip Average Price by Computing Architecture (2021-2032) & (US\$/Unit)

Figure 51. World Unmanned Delivery Vehicle Chip Production Value by Typical Power Consumption, (USD Million), 2021 & 2025 & 2032

Figure 52. World Unmanned Delivery Vehicle Chip Production Value Market Share by Typical Power Consumption in 2025

Figure 53. <10 W

Figure 54. >10-30 W

Figure 55. >30-60 W

Figure 56. >60 W

Figure 57. World Unmanned Delivery Vehicle Chip Production Market Share by Typical Power Consumption (2021-2032)

Figure 58. World Unmanned Delivery Vehicle Chip Production Value Market Share by Typical Power Consumption (2021-2032)

Figure 59. World Unmanned Delivery Vehicle Chip Average Price by Typical Power Consumption (2021-2032) & (US\$/Unit)

Figure 60. World Unmanned Delivery Vehicle Chip Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 61. World Unmanned Delivery Vehicle Chip Production Value Market Share by Application in 2025

Figure 62. Food and Beverage Delivery

Figure 63. Parcel and Express Delivery

Figure 64. Grocery and Retail Delivery

Figure 65. Medical and Institutional Delivery

Figure 66. Industrial and Park Logistics

Figure 67. Other

Figure 68. World Unmanned Delivery Vehicle Chip Production Market Share by

Application (2021-2032)

Figure 69. World Unmanned Delivery Vehicle Chip Production Value Market Share by Application (2021-2032)

Figure 70. World Unmanned Delivery Vehicle Chip Average Price by Application (2021-2032) & (US\$/Unit)

Figure 71. Unmanned Delivery Vehicle Chip Industry Chain

Figure 72. Unmanned Delivery Vehicle Chip Procurement Model

Figure 73. Unmanned Delivery Vehicle Chip Sales Model

Figure 74. Unmanned Delivery Vehicle Chip Sales Channels, Direct Sales, and Distribution

Figure 75. Methodology

Figure 76. Research Process and Data Source

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