

Global AI Application-Specific Integrated Circuits Market Growth 2026-2032

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Abstracts

The global AI Application-Specific Integrated Circuits market size is predicted to grow from US\$ 36000 million in 2025 to US\$ 208611 million in 2032; it is expected to grow at a CAGR of 24.4% from 2026 to 2032.

AI Application-Specific Integrated Circuits, or AI ASICs, refer to integrated circuits purpose-built to accelerate artificial intelligence workloads such as training, inference, recommendation, computer vision, speech processing, autonomous driving, robotics, edge perception and large-model serving. This research focuses on AI processors and accelerator devices whose architectures are deliberately optimized for tensor operations, matrix multiplication, low-precision arithmetic, on-chip memory, near-memory or in-memory computing, dataflow scheduling, chiplet interconnect, high-bandwidth memory and hardware-software co-design. The product scope includes cloud training ASICs, cloud inference ASICs, TPU-like processors, NPUs, LPUs, RDUs, IPU, automotive AI SoCs, edge AI processors, and custom AI silicon or turnkey ASIC services for AI and HPC customers.

Indicative pricing varies widely: edge AI chips may range from several dollars to tens of dollars, automotive AI SoCs often fall in the tens-to-hundreds of dollars range, while data-center AI ASIC modules and high-end custom accelerators may reach several thousand to tens of thousands of dollars depending on process node, HBM configuration, packaging, module format and customer-specific design requirements.

Based on our research, the AI ASIC market should be understood as a specialised compute architecture market rather than a simple extension of conventional semiconductor products. Its value proposition lies in reducing architectural redundancy and improving performance per watt, performance per dollar and workload-level

efficiency for specific AI tasks. Compared with general-purpose GPUs, AI ASICs are designed around narrower but economically important workloads, including large-model inference, recommendation systems, computer vision, speech processing, autonomous driving and edge perception. For this reason, the report adopts a narrow professional scope: general-purpose GPUs, FPGAs, pure IP vendors, foundry-only suppliers and AI server integrators are excluded from the core market definition.

From the supply side, the global market is increasingly structured around three groups of participants. The first consists of hyperscalers such as Google, AWS, Meta and Microsoft, whose AI ASIC programmes are primarily aimed at lowering the long-term unit cost of internal AI infrastructure. The second consists of custom silicon and turnkey ASIC suppliers such as Broadcom, Marvell, GUC and Alchip, which capture value from advanced-node design, HBM integration, chiplet architecture and 2.5D/3D packaging complexity. The third group consists of specialist AI chip vendors such as Cerebras, Groq, SambaNova, d-Matrix, Hailo, Rebellions, FuriosaAI, Axelera, Horizon Robotics and Cambricon, each seeking differentiation in cloud inference, edge AI, automotive AI or domestic substitution.

From the demand side, the market is being driven by a shift from GPU-only scaling toward heterogeneous AI infrastructure combining GPUs, custom ASICs and workload-specific inference processors. The key growth factors include the rising cost of large-model inference, shortages of HBM and advanced packaging capacity, power and cooling constraints in AI data centres, and policy-driven demand for sovereign compute. At the same time, the sector remains exposed to several structural risks. Highly specialised chips can be vulnerable to rapid changes in model architecture, while weak software ecosystems can slow customer adoption. In practice, the winners are likely to be those that combine silicon efficiency, software maturity, supply-chain execution and credible access to advanced packaging capacity.

LP Information, Inc. (LPI) ' newest research report, the ?AI Application-Specific Integrated Circuits Industry Forecast? looks at past sales and reviews total world AI Application-Specific Integrated Circuits sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Application-Specific Integrated Circuits sales for 2026 through 2032. With AI Application-Specific Integrated Circuits sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AI Application-Specific Integrated Circuits industry.

This Insight Report provides a comprehensive analysis of the global AI Application-

Specific Integrated Circuits landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AI Application-Specific Integrated Circuits portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AI Application-Specific Integrated Circuits market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Application-Specific Integrated Circuits and breaks down the forecast by Product Function, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AI Application-Specific Integrated Circuits.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Application-Specific Integrated Circuits market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Function:

Training-oriented AI ASIC

Inference-oriented AI ASIC

Edge AI Processor

Automotive AI SoC

Segmentation by Architecture Route:

Tensor / Matrix Array ASIC

Dataflow AI Processor

In-memory / Near-memory AI ASIC

Other

Segmentation by Packaging Class:

HBM-based Advanced Package ASIC

GDDR / LPDDR-based ASIC

On-chip SRAM-centric ASIC

Standard Package Edge AI ASIC

Other

Segmentation by Application:

Large Model Training and Serving

Recommendation and Search Ranking

Intelligent Driving

Edge Vision and Robotics

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Broadcom Inc.

Google LLC

Amazon Web Services

Marvell Technology

Huawei Technologies

Meta Platforms

Microsoft Corporation

Intel Corporation

Cambricon

Kunlunxin

Enflame Technology

Cerebras Systems

Groq

SambaNova Systems

Horizon Robotics

Black Sesame Technologies

Hailo Technologies

Rebellions

FuriosaAI

d-Matrix

SiMa

Axelera AI

EdgeCortex

GUC

Alchip Technologies

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Application-Specific Integrated Circuits market?

What factors are driving AI Application-Specific Integrated Circuits market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AI Application-Specific Integrated Circuits market opportunities vary by end market size?

How does AI Application-Specific Integrated Circuits break out by Product Function, by Application?

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