

Global AI PC NPU Chip Market Growth 2026-2032

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Abstracts

The global AI PC NPU Chip market size is predicted to grow from US\$ 941 million in 2025 to US\$ 3004 million in 2032; it is expected to grow at a CAGR of 18.0% from 2026 to 2032.

An AI PC NPU chip is a dedicated Neural Processing Unit integrated into PC processors or SoCs, designed to accelerate on-device AI inference workloads such as large language model inference, image generation, speech recognition, and video enhancement. In 2025, global AI PC NPU chip production reached approximately 75.18 M Units. Upstream includes EDA tools, semiconductor IP (CPU/GPU/NPU cores), advanced process wafer fabrication (5nm/3nm nodes), and advanced packaging/testing technologies, all of which determine compute density and power efficiency.

The AI PC NPU chip market refers to the neural processing units integrated into PC SoCs, designed to accelerate on-device AI inference workloads such as large language models, image generation, speech recognition, and intelligent system optimization. Driven by the shift of AI from cloud to edge devices, the personal computer is evolving from a traditional general-purpose computing device into an AI-native computing terminal. In this transformation, the NPU emerges as a third core compute engine alongside CPU and GPU. Compared to GPUs, NPUs offer significantly higher power efficiency for matrix-intensive workloads, making them a critical component of AI PC architectures.

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

This Insight Report provides a comprehensive analysis of the global AI PC NPU Chip 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 PC NPU Chip portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AI PC NPU Chip market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI PC NPU Chip and breaks down the forecast by Type, 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 PC NPU Chip.

This report presents a comprehensive overview, market shares, and growth opportunities of AI PC NPU Chip market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Integrated NPU

Discrete AI NPU

Segmentation by Architecture:

x86 Platform NPU

ARM PC NPU

GPU Collaborative AI Architecture

Segmentation by Compute Capability:

Low-end NPU (40 TOPS)

Segmentation by PC Application:

AI Laptop PCs

AI Desktop PCs

Commercial/Enterprise AI PC

Gaming AI PC

Segmentation by Application:

Local Large Model Inference

Image/Video Generation

Speech Recognition/Translation

AI Office Assistant

Others

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.

Intel

AMD

Apple

Qualcomm

MediaTek

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI PC NPU Chip market?

What factors are driving AI PC NPU Chip market growth, globally and by region?

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

How do AI PC NPU Chip market opportunities vary by end market size?

How does AI PC NPU Chip break out by Type, by Application?

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