

Global AI Tensor/Matrix Compute Core Market Growth 2026-2032

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Abstracts

The global AI Tensor/Matrix Compute Core market size is predicted to grow from US\$ 90782 million in 2025 to US\$ 377510 million in 2032; it is expected to grow at a CAGR of 19.5% from 2026 to 2032.

An AI Tensor/Matrix Compute Core refers to a dedicated hardware compute block embedded in GPUs, NPUs, AI ASICs, SoCs, edge AI processors, or licensable semiconductor IP, designed to accelerate tensor and matrix-intensive workloads in deep learning, generative AI, recommendation systems, computer vision, and edge intelligence. It typically appears as a tensor engine, matrix core, MAC array, systolic array, Cube Unit, NeuronCore, NPU core, reconfigurable dataflow unit, or AI accelerator core. Its primary function is to execute matrix multiplication, convolution, fused multiply-add, attention-related operations, quantised inference, low-precision floating-point computation, sparse computation, and selected data movement tasks. Key technical parameters include supported data formats such as FP32, TF32, FP16, BF16, FP8, FP6, FP4, INT8 and INT4, MAC throughput, on-chip SRAM or buffer structure, memory-bandwidth coupling, compiler programmability, sparsity support, power efficiency, and multi-chip scalability.

Where sold as semiconductor IP, the commercial value is reflected in licence fees, engineering service fees and royalties; where embedded in AI accelerators, its value is attributed to the compute portion of the chip or module ASP. This report focuses on the hardware compute-core and chip/IP-level attributable value rather than complete AI servers, cloud service revenue, or data-centre infrastructure.

According to our research, the AI tensor/matrix compute core should not be treated as a standalone commodity component or as a synonym for NVIDIA Tensor Core alone. It is

a specialised compute block embedded inside GPUs, NPUs, AI ASICs, SoCs and licensable semiconductor IP, designed to accelerate matrix multiplication, convolution, attention-related computation and low-precision multiply-accumulate operations. Its economic value is usually captured through the surrounding chip, accelerator card, custom ASIC, SoC or IP licensing model rather than through a separately traded component market. For this reason, the most appropriate statistical boundary is a chip/IP-level attributable-value approach. A broad definition would incorrectly merge this topic with AI servers, cloud services or data-centre infrastructure, while an excessively narrow definition would understate the market by treating it as a vendor-specific GPU feature.

From a supply perspective, the global competitive structure is led by the United States, where NVIDIA, AMD, Intel, Google, AWS, Microsoft, Broadcom, Meta, Qualcomm, Apple, Cerebras, Groq, SambaNova and Tenstorrent represent different branches of the AI compute-core ecosystem. NVIDIA remains the clear leader in merchant data-centre AI accelerators, while AMD and Intel compete through matrix-core GPU and accelerator architectures. Google, AWS, Microsoft and Meta represent the hyperscaler custom-silicon route, supported in part by suppliers such as Broadcom. Arm, Synopsys, Cadence and CEVA occupy a distinct IP-licensing layer, enabling SoC vendors to embed NPU or AI compute cores into mobile, automotive, IoT and industrial products. China is developing a parallel domestic supply base led by Huawei Ascend, Cambricon, Moore Threads, Biren, Enflame, Iluvatar CoreX, MetaX, Kunlunxin and Alibaba T-Head, although the maturity of software ecosystems and high-volume deployment varies materially by vendor.

Demand is being driven primarily by large-scale AI training, high-throughput inference, long-context model serving, recommender-system acceleration and cloud providers' efforts to control compute costs through custom silicon. Edge AI, AI PCs, smartphones, intelligent vehicles, robotics and industrial vision also create substantial unit demand for NPU cores, but their attributable value per chip is much lower than that of data-centre accelerators. Therefore, market sizing should not be based solely on unit shipments or TOPS claims. A more robust model needs to consider precision support, usable model throughput, memory bandwidth, on-chip storage, compiler maturity, ecosystem compatibility and deployment scale. The migration from FP16/BF16 toward FP8, FP6, FP4 and INT4 is raising the strategic importance of specialised tensor and matrix datapaths.

Looking ahead, competition will increasingly move from raw peak performance toward full-stack efficiency. NVIDIA's advantage lies in the combination of tensor-core

architecture, CUDA software depth and system-level deployment capability. AMD, Intel and emerging GPU suppliers will compete through memory capacity, open software stacks and price-performance positioning. Hyperscalers will continue to increase their use of custom ASICs where workload predictability and deployment scale justify dedicated silicon. Meanwhile, edge AI suppliers will pursue lower-power architectures for vision, robotics, industrial automation and on-device multimodal inference. The most important risks are partial substitution by custom AI ASICs, commoditisation of simple MAC-array IP, and rapid shifts in model architecture that can make fixed-function accelerators less attractive unless supported by strong compiler and software ecosystems.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Tensor/Matrix Compute Core and breaks down the forecast by Core Architecture 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 Tensor/Matrix Compute Core.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Tensor/Matrix Compute Core market by product type, application, key manufacturers and key regions and countries.

Segmentation by Core Architecture Type:

GPU Tensor / Matrix Core

NPU / Neural Compute Core

Custom AI ASIC Tensor Engine

Other

Segmentation by Commercialization Model:

Merchant Accelerator Chip

Captive Hyperscaler ASIC

Licensable Semiconductor IP

Embedded SoC Core

Segmentation by Precision Support:

FP32 / TF32 / FP16 / BF16 Core

FP8 / FP6 / FP4 Core

INT8 / INT4 Quantized Core

Mixed-Precision Core

Other

Segmentation by Application:

Data Center Training

Data Center Inference

Edge AI and Industrial Vision

Automotive and On-device AI

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.

NVIDIA Corporation

Broadcom Inc.

Google LLC

AMD

Amazon Web Services

Huawei Technologies

Microsoft

Intel

Qualcomm

Apple

Meta Platforms

Arm Holdings

Synopsys

Cadence

CEVA

Cerebras

Groq

SambaNova

Tenstorrent

Cambricon

Moore Threads

Biren Technology

Enflame

Iluvatar CoreX

FuriosaAI

Hailo

Axelera AI

SiMa

IBM

MediaTek

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Tensor/Matrix Compute Core market?

What factors are driving AI Tensor/Matrix Compute Core market growth, globally and by region?

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

How do AI Tensor/Matrix Compute Core market opportunities vary by end market size?

How does AI Tensor/Matrix Compute Core break out by Core Architecture Type, by Application?

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