

Global NPU Chip Market Growth 2026-2032

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Abstracts

The global NPU Chip market size is predicted to grow from US\$ 44302 million in 2025 to US\$ 145523 million in 2032; it is expected to grow at a CAGR of 17.9% from 2026 to 2032.

NPU chips, or neural processing unit chips, are dedicated or semi-dedicated processors designed for artificial intelligence neural network computing tasks and represent an important branch of AI accelerator chips. They mainly address the limitations of traditional CPUs in large-scale matrix multiplication, convolution operations, tensor computing, attention mechanisms, low-precision inference, and real-time perception tasks, including insufficient energy efficiency, relatively high latency, and limited parallel throughput. Unlike CPUs, which emphasize general-purpose control capabilities, or GPUs, which emphasize large-scale parallel graphics and general-purpose computing, NPUs are typically optimized around the operator structure of neural network models. Through tensor computing units, on-chip cache, dataflow scheduling, model quantization, sparse computing, low-bit integer computing, and hardware-software co-compilation, NPUs improve AI inference capability per unit of power consumption.

NPU chips are a critical hardware foundation that connects algorithmic models, terminal devices, data centers, and industry-specific scenarios. Their main applications include on-device image recognition, voice wake-up, facial recognition, structured video analytics, autonomous driving perception, intelligent cockpit interaction, robotic vision, industrial defect inspection, local AI inference on AI PCs, generative AI on smartphones, and edge server inference. In the early stage, NPUs mainly served lightweight vision and speech models, with an emphasis on INT8 inference and low power consumption. They have since evolved toward multi-precision computing, Transformer model adaptation, enhanced on-chip memory, dataflow architectures, on-device large models, and multimodal inference. In the current market, demand is gradually expanding toward cloud inference, edge inference, and on-device intelligence. Scenarios such as

smartphones, automobiles, security, industrial applications, PCs, and robotics are all strengthening local AI processing capabilities. The upstream segments of NPU chips include semiconductor IP, EDA tools, advanced-node wafer foundry services, packaging and testing, high-bandwidth memory, silicon wafers, photoresists, electronic specialty gases, advanced substrates, and thermal management materials. Downstream applications cover consumer electronics, intelligent vehicles, industrial manufacturing, security monitoring, cloud services, communications equipment, medical imaging, robotics, and smart cities. Upstream supply capabilities directly affect the cost, delivery schedule, process-node advancement, and performance ceiling of NPU chips. Advanced wafer manufacturing, advanced packaging, and high-performance memory have an especially significant impact on high-end AI processors. Downstream application scale determines the pace of mass production and price elasticity. Smartphones, IoT devices, and cameras place greater emphasis on low cost and low power consumption. Automobiles place greater emphasis on automotive-grade certification, functional safety, and long-term supply. Data centers place greater emphasis on throughput, memory bandwidth, and system-level energy efficiency. High-end data center NPUs, automotive intelligent-driving NPUs, and large-model inference chips rely on advanced process nodes, complex packaging, high-speed interconnects, high-reliability validation, and mature software ecosystems. As a result, their prices are expected to remain relatively resilient in the short term, and their unit product value will remain high. By contrast, NPUs used in consumer electronics, smart cameras, IoT devices, and lightweight edge AI applications will continue to decline in price as process technologies mature, IP reuse increases, SoC integration improves, and the number of suppliers grows. This will be reflected in a declining cost per TOPS and rising AI computing power per device. In terms of output, the standardization of AI functions in smartphones, PCs, automobiles, and edge devices will drive NPUs from high-end configurations into mid-range and lower-end devices. Embedded NPU shipments will be significantly higher than those of standalone accelerator cards. However, standalone AI accelerators and server-grade NPUs will still account for a relatively high share of revenue in cloud inference, video analytics, and enterprise AI infrastructure. In terms of market size, the broader AI chip market will be jointly driven by generative AI, intelligent driving, AI PCs, robotics, and edge AI, with particularly strong growth in edge AI accelerators and automotive edge AI accelerators. Overall, over the next one to three years, NPU chips are expected to become foundational hardware in computing systems, while long-term price declines and rapid expansion of the total market size occur simultaneously.

LP Information, Inc. (LPI) ' newest research report, the "NPU Chip Industry Forecast" looks at past sales and reviews total world NPU Chip sales in 2025, providing a

comprehensive analysis by region and market sector of projected NPU Chip sales for 2026 through 2032. With NPU Chip sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world NPU Chip industry.

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

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

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

Segmentation by Product Form:

Standalone NPU Chip

NPU-Integrated SoC Chip

Segmentation by Application Field:

Digital Tensor NPU Chip

Vision-Specific NPU Chip

Compute-In-Memory NPU Chip

Other

Segmentation by Technology Implementation Form:

General Tensor NPU Chip

Vision Inference NPU Chip

Audio And Sensor NPU Chip

Other

Segmentation by Application:

Cloud Computing

PC Terminal

Mobile Terminal

Automotive Electronics

Industrial Vision

IoT Terminal

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

Hailo

Kneron

Syntiant

NXP

STMicroelectronics

Axelera AI

SiMa.ai

Renesas

EdgeCortex

Socionext

Samsung Electronics

DEEPX

FuriosaAI

Rebellions

Mobilint

MediaTek

Himax

Cambricon

Huawei

Horizon Robotics

Black Sesame Technologies

Rockchip

Allwinner

UNISOC

MemryX

Beijing Ingenic

Key Questions Addressed in this Report

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

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

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

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

How does NPU Chip break out by Product Form, by Application?

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