

Global RISC-V-based AI Accelerator SoC Market Growth 2026-2032

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Abstracts

The global RISC-V-based AI Accelerator SoC market size is predicted to grow from US\$ 411 million in 2025 to US\$ 3578 million in 2032; it is expected to grow at a CAGR of 32.4% from 2026 to 2032.

A RISC-V-based AI Accelerator SoC refers to a system-on-chip, accelerator silicon, or heterogeneous processor that uses the RISC-V instruction set architecture as a general-purpose processing core, control core, vector processing element, matrix/tensor execution interface, or programmable scheduling engine, and integrates dedicated AI acceleration resources such as an NPU, CNN accelerator, KPU, DSP/VPU, vector extension, custom AI instruction extensions, on-chip SRAM, power-management logic, and high-speed on-chip interconnects. The product is designed to execute AI inference and related workloads locally across edge vision, audio intelligence, sensor fusion, robotics, automotive intelligence, telecom network intelligence, edge servers, and data-center inference. This study focuses on chip-level products and silicon platforms with explicit AI acceleration capability and a meaningful RISC-V architectural role.

Based on our research, the RISC-V-based AI Accelerator SoC market is still an emerging and heterogeneous segment rather than a mature single-product category. Its core value does not come from replacing all existing AI chips, but from enabling highly customized, energy-efficient, and workload-specific silicon designs where an open and extensible ISA matters. The product boundary should therefore be drawn narrowly around chip-level products that combine a meaningful RISC-V architectural role with explicit AI acceleration capability, such as a RISC-V CPU plus NPU SoC, a RISC-V AI MCU, a many-core RISC-V inference chip, a RISC-V AI CPU, or a RISC-V-controlled chiplet AI accelerator. This boundary is important because the broader ecosystem includes many RISC-V CPU IP vendors, development boards, modules, and Arm-based

AI SoCs that are relevant to adoption but should not be counted as RISC-V AI Accelerator SoC revenue.

Demand in 2025 is still concentrated in low-power edge inference, AIoT, machine vision, hearables, embedded sensing, and small-scale engineering deployments. The 2026–2032 growth path depends on whether RISC-V-based AI chips can gain design wins in automotive AI, robotics, O-RAN, edge LLM devices, industrial intelligence, and power-efficient server inference. The addressable opportunity is real, but the adoption curve will be constrained by software maturity, model deployment tools, compiler quality, customer qualification cycles, and the ability to offer reliable reference designs. For this reason, the market should be forecast conservatively: RISC-V AI SoCs are likely to expand in specialized and power-sensitive applications first, rather than immediately displacing GPUs or mainstream Arm-based edge AI SoCs.

From a product roadmap and architecture perspective, RISC-V-based AI Accelerator SoCs are evolving from simple “RISC-V CPU + lightweight CNN accelerator” designs toward more heterogeneous architectures that combine RISC-V control cores, vector extensions, tensor or matrix engines, dedicated NPUs, on-chip memory, and increasingly chiplet-based integration. Early commercial products were mainly optimized for low-power vision, audio, and AIoT inference, while newer platforms are expanding toward edge LLM inference, robotics, telecom AI, automotive intelligence, and data-center-class power-efficient acceleration. This evolution suggests that the industry’s competitive focus is shifting from basic RISC-V adoption to system-level AI performance, software toolchains, model deployment efficiency, memory bandwidth, and workload-specific customization. Companies with stronger compiler support, quantization tools, reference designs, and ecosystem partnerships are likely to gain a more durable position than vendors that only offer standalone silicon specifications.

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

This Insight Report provides a comprehensive analysis of the global RISC-V-based AI Accelerator SoC 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 RISC-V-based AI Accelerator SoC portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global RISC-V-based AI Accelerator SoC market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for RISC-V-based AI Accelerator SoC 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 RISC-V-based AI Accelerator SoC.

This report presents a comprehensive overview, market shares, and growth opportunities of RISC-V-based AI Accelerator SoC market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

RISC-V Edge AI SoC

RISC-V Application AI SoC

Other

Segmentation by Performance Class:

Ultra-low Performance Class

Low Performance Class

Mid Performance Class

High Performance Class

Very High Performance Class

Segmentation by Numeric Precision:

INT8 Precision

INT4 / Sub-8-bit Precision

FP16 / BF16 Precision

FP8 Precision

Other

Segmentation by Compute Architecture:

RISC-V Vector Architecture

RISC-V Tensor / Matrix Architecture

Other

Segmentation by Application:

Consumer Electronics

Smart Home

Industrial Automation

Healthcare Devices

Energy & Utilities

Data Center & Edge Server

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.

NXP Semiconductors N.V.

Analog Devices, Inc.

Alibaba Group Holding Limited

Tenstorrent Inc.

Axelera AI B.V.

Canaan Inc.

Beijing ESWIN Computing Technology Co., Ltd.

SOPHGO Technologies Ltd.

EdgeQ Inc.

SpacemiT Hangzhou Technology Co., Ltd.

GreenWaves Technologies

Suzhou China Core Microelectronics Co., Ltd.

BOS Semiconductors Co., Ltd.

Esperanto Technologies, Inc.

Kneron, Inc.

Key Questions Addressed in this Report

What is the 10-year outlook for the global RISC-V-based AI Accelerator SoC market?

What factors are driving RISC-V-based AI Accelerator SoC market growth, globally and by region?

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

How do RISC-V-based AI Accelerator SoC market opportunities vary by end market size?

How does RISC-V-based AI Accelerator SoC break out by Type, by Application?

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