

Global Robotic AI Vision Chip Market Growth 2026-2032

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Abstracts

The global Robotic AI Vision Chip market size is predicted to grow from US\$ 906 million in 2025 to US\$ 2729 million in 2032; it is expected to grow at a CAGR of 17.0% from 2026 to 2032.

Robotic AI vision chips are application-specific integrated circuits (ASICs/SoCs) designed for edge computing scenarios in robotics and optimized specifically for visual perception and AI inference. They integrate high-performance ISPs (image signal processors), dedicated NPUs (neural network processors), video codecs, and multi-core CPUs, enabling real-time image acquisition, feature extraction, object detection / tracking, scene understanding, pose estimation, and obstacle avoidance planning, supporting the 'vision-cognition-action' closed-loop for service robots, industrial robots, humanoid robots, and others. Key performance metrics include TOPS computing power, power consumption, latency, frame rate, and visual accuracy. The chip must be compatible with multi-sensor fusion (2D/3D vision), low-power edge deployment, and real-time requirements.

By 2025, global sales of robotics AI vision chips will reach 43.03 million units, with an average price of \$21.51 per unit.

Development Trends

Dual Improvement in Computing Power and Energy Efficiency

Evolving from entry-level 5-10 TOPS to mid-range 20-100 TOPS and **150 TOPS+** high-end models, supporting large models (2B parameters) and multimodal perception.

Process technology is iterating toward 7nm and below, with energy efficiency improving to over 10 TOPS/W, making them suitable for battery-powered robots.

Technology Roadmap Iteration

Mainstream: ISP+NPU heterogeneous SoCs (Horizon Robotics, Black Sesame, Starry, etc.); High-end: CPU+GPU+NPU convergence (NVIDIA Jetson Thor).

3D vision (ToF / structured light) and multi-sensor fusion (vision + LiDAR + IMU) become standard features in mid-to-high-end models.

Technologies such as mercury-free UV-LED lighting, low-light enhancement, and AI-based noise reduction improve robustness in complex environments.

Expansion of Application Scenarios

Service robots (vacuuming, delivery, companionship) are rapidly gaining market penetration; industrial robots (inspection, assembly, sorting) are upgrading to higher precision and speed; humanoid robots are entering the early stages of mass production.

Policy and Industry Drivers: Embodied intelligence, smart manufacturing, and the silver economy are driving demand, while domestic substitution is accelerating.

Evolution of the Competitive Landscape

European and American companies (NVIDIA, Ambarella, TI) dominate high-end computing power and ecosystems; Chinese companies (Horizon Robotics, StarChase, Fuhuan Micro) are rapidly gaining ground in the mid-to-low-end market with cost-effective solutions and localized applications.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Robotic AI Vision 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 Robotic AI Vision Chip.

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

Segmentation by Type:

Low Computing Power (<10 TOPS)

Medium Computing Power (10-100 TOPS)

High Computing Power (>150 TOPS)

Segmentation by Visual type:

2D Vision

3D Vision

Multimodal Fusion

Segmentation by Sales Channels:

Direct Sales

Distribution

Segmentation by Application:

Service Robots

Industrial Robots

Humanoid Robots

Special-purpose Robots

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?US?

Qualcomm?US?

AMD?US?

Renesas Electronics?JP?

NXP Semiconductors?NL?

Sony Semiconductor Solutions?JP?

Ambarella?US?

Rockchip?CN?

Hailo?IL?

Synaptics?US?

Cambricon?CN?

Axera?CN?

Socionext?JP?

Black Sesame Technologies ??????CN?

Axelera AI?NL?

Key Questions Addressed in this Report

What is the 10-year outlook for the global Robotic AI Vision Chip market?

What factors are driving Robotic AI Vision Chip market growth, globally and by region?

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

How do Robotic AI Vision Chip market opportunities vary by end market size?

How does Robotic AI Vision Chip break out by Type, by Application?

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- 1.2 Years Considered
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