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# Global Security AI Vision Processor Market Growth 2026-2032

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## Abstracts

The global Security AI Vision Processor market size is predicted to grow from US$ 1096 million in 2025 to US$ 2274 million in 2032; it is expected to grow at a CAGR of 10.9% from 2026 to 2032.

Security AI Vision Processor refers to semiconductor processors designed primarily for intelligent security cameras, video surveillance terminals and related edge-vision systems, integrating video capture and processing with on-device artificial intelligence. The market is centered on AI Vision SoCs and dedicated vision processors that combine functions such as CPU processing, image signal processing (ISP), neural processing or other AI acceleration, H.264/H.265 video encoding and decoding, memory interfaces, security engines and camera connectivity within a highly integrated chip architecture. Performance differentiation is typically reflected in AI computing capability measured in TOPS, supported image resolution and frame rate, ISP image quality, low-light performance, number of video streams, power consumption, memory requirements and software-tool maturity. Security AI Vision Processor enables cameras and edge devices to perform local object detection, classification, recognition, behavioral analysis, intelligent event triggering and image enhancement with lower latency and reduced dependence on cloud processing. The study focuses on merchant processors used across public safety and smart city, commercial and enterprise security, residential security, industrial security, transportation security and other professional security markets.

## Key Findings

The confirmed Core Formal List contains 26 merchant Security AI Vision Processor suppliers across specialist vision SoC and broader edge AI platforms

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Integrated AI Vision SoCs remain the mainstream architecture by combining ISP video codec CPU and dedicated AI inference within a single device

One leading listed supplier reported more than 120 million intelligent-security chip shipments in 2025 highlighting the market's high-volume economics

Asia has the deepest merchant supplier base while North America and Israel show stronger participation in premium AI-centric edge vision architectures

Product tiers span below 1 TOPS to above 10 TOPS and from mainstream HD imaging to above-8MP security camera processing

## Market Trends

Security AI Vision Processor development is moving from conventional video compression and basic analytics toward AI-native camera computing. Increasing AI workloads are driving greater integration of NPU, ISP, video codec, CPU and security functions, allowing inference, image enhancement and event analysis to be executed directly inside cameras. AI-ISP is becoming an important differentiation layer because security applications require reliable analytics under low illumination, high dynamic range, motion blur and difficult weather conditions rather than only higher nominal resolution. At the high end, current products already demonstrate 20-TOPS-class AI processing, 4K30 imaging pipelines and sub-5W operating envelopes, illustrating how performance-per-watt is becoming as important as peak computing capability. The longer-term direction is toward scalable architectures covering low-cost battery cameras through advanced multi-sensor systems, with always-on vision, concurrent AI models, local privacy processing and increasingly sophisticated vision-language or generative AI functions. Software stacks, model deployment tools and reference designs are therefore becoming progressively more important in purchasing decisions alongside silicon specifications.

## Market Dynamics

### Drivers

Demand is being driven by the transition of security cameras from passive recording devices into intelligent edge sensors capable of real-time perception and decision support. Public safety, commercial facilities, residential security and industrial

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environments increasingly require object detection, intrusion detection, human and vehicle analysis, low-light enhancement and automated event generation without sending every video stream to centralized computing infrastructure. On-device processing can reduce latency, bandwidth requirements and cloud-computing dependence while improving the ability to retain sensitive video locally. At the semiconductor level, continued integration of ISP, NPU, codec, CPU and connectivity functions also lowers system complexity and supports migration of AI capabilities from premium cameras into mainstream price bands. Replacement of conventional IPC platforms with AI-enabled architectures, together with increasing camera intelligence per installed device rather than simply growth in camera counts, is becoming an important structural source of semiconductor demand.

## Restraints

The principal restraint is the persistent requirement to balance AI performance, imaging quality, power consumption and chip cost within highly price-sensitive camera platforms. Mainstream security cameras are manufactured at large volumes, making even small increases in processor, memory and power-system cost commercially significant. Higher AI capability can also increase external DRAM requirements, thermal design complexity and software development effort, limiting the speed at which high-performance architectures penetrate lower-priced products. The market is additionally exposed to semiconductor manufacturing concentration, foundry capacity cycles and packaging or memory cost fluctuations. For processor suppliers, strong silicon specifications do not automatically translate into design wins because camera manufacturers require mature ISP tuning, stable video pipelines, long product life cycles, cybersecurity capabilities and extensive software support. These factors create substantial qualification costs and can extend replacement cycles even when new processors provide materially higher AI performance.

## Opportunities

The most attractive opportunities are emerging where conventional camera architectures cannot efficiently meet new intelligence requirements. Battery-powered and always-on security devices create demand for ultra-low-power processors capable of maintaining event detection while minimizing active power. Premium IP cameras increasingly require multiple neural networks to operate simultaneously with high-resolution encoding and advanced low-light enhancement, opening opportunities for higher-compute AI Vision SoCs. Generative AI and vision-language models may create another layer of value by enabling semantic video search, richer scene understanding and natural-language interaction with recorded or live video, although deployment

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economics will initially favor higher-end products. Hailo has already introduced camera-oriented processors capable of running advanced AI analytics and vision-language workloads locally, while broader platform suppliers are extending AI-native camera portfolios across multiple performance tiers. Localization of semiconductor supply, reference-design ecosystems and application-specific software also creates room for regional suppliers to win designs where cost, technical support and customization are critical.

### Challenges

Competition is intensifying because Security AI Vision Processor sits at the intersection of traditional surveillance video SoCs, general-purpose edge processors and dedicated AI architectures. Established suppliers must continually increase AI capability without losing cost competitiveness, while newer AI-focused companies must build the ISP quality, video-processing maturity, camera interfaces and software ecosystems required by long-cycle security products. Cybersecurity, privacy and regulatory requirements further increase the engineering burden because more inference and sensitive video processing occur directly at the edge. Another structural challenge is the presence of captive semiconductor development among certain large security-camera manufacturers; internally developed processors can reduce the addressable merchant-chip opportunity in selected product lines. Suppliers therefore need to compete not only on TOPS or process node, but on complete platform economics, image quality, power efficiency, software portability, model compatibility, reference designs and long-term supply assurance.

## Industry Chain Analysis

The Security AI Vision Processor industry chain follows the broader fabless semiconductor model but places unusually high emphasis on image-processing IP and camera software. Upstream activities include semiconductor IP, EDA tools, CPU and interface architectures, foundry manufacturing, packaging and testing, image sensors, memory and supporting power-management devices. Most specialist suppliers concentrate on chip architecture and software while relying on external wafer foundries and semiconductor assembly and test providers. The processor design stage integrates CPU, ISP, video codec, NPU or other AI engines, DSP, memory controllers, security functions and camera interfaces into a power- and cost-constrained SoC. Product competitiveness depends not only on transistor-level performance but also on ISP tuning, AI compiler efficiency, video pipelines, sensor compatibility and long-term software maintenance.

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Downstream, processors are incorporated into camera modules, IP cameras, battery cameras, video doorbells, body-worn devices, NVR-related systems and other intelligent security terminals before entering professional security systems. Value creation increasingly shifts toward suppliers able to combine silicon with optimized SDKs, model libraries, reference designs and application-level algorithms. Consequently, the economic value of a processor platform cannot be assessed solely through chip ASP: shorter customer development cycles, lower external-memory requirements, reduced power-system cost and faster AI-model deployment can materially affect total system cost. This favors highly integrated platforms while preserving opportunities for differentiated processors in high-performance applications.

## Segment Insights

By product type, integrated AI Vision SoCs represent the central architecture of the Security AI Vision Processor market because security cameras generally require image acquisition, ISP processing, video encoding and AI inference to operate continuously within tight thermal and cost constraints. Standalone AI processors and accelerators remain relevant where existing camera platforms require additional inference capability or where higher AI performance is needed without redesigning the entire video-processing architecture. The market therefore shows a clear progression from highly cost-optimized integrated camera SoCs toward more AI-centric vision processors as application complexity increases.

By performance tier, entry-level products emphasize sub-1-TOPS computing, low power and basic event analytics, while the 1–5 TOPS range supports broader mainstream intelligent-camera functions. Products above 5 TOPS increasingly address simultaneous neural networks, complex recognition and enhanced imaging, and the above-10-TOPS tier targets premium cameras requiring advanced multi-model analytics and emerging generative-AI workloads. Resolution follows a similar hierarchy from 1080p and 2MP-class devices through 5MP, 8MP/4K and higher-resolution products. Rather than computing performance alone, the commercially important metric is increasingly usable AI performance per watt combined with image quality and memory efficiency.

## Downstream Market Opportunities

Demand opportunities differ significantly by application market. Public safety and smart-city deployments emphasize reliability, high-resolution evidence capture, multi-object

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analytics and long product support cycles, while commercial and enterprise security increasingly values analytics that can convert surveillance video into operational information such as occupancy, intrusion and loss-prevention events. Residential security creates a different opportunity around battery life, always-on detection, low system cost and privacy-sensitive local inference, making low-power AI processors particularly important. Industrial and transportation applications require robustness, low-light performance and increasingly complex scene analysis, supporting higher-performance products when operational safety or automated incident detection justifies additional semiconductor cost. Financial, education and healthcare security remain comparatively specialized but can support processors with stronger security, privacy and access-control integration. Across these markets, incremental value increasingly comes from intelligence per camera rather than simple increases in installed camera counts.

## Regional Insights

Asia forms the deepest supply-side cluster for Security AI Vision Processor, with Mainland China and Taiwan supporting a particularly dense ecosystem of security-video SoC designers, camera manufacturers, ODMs and semiconductor manufacturing partners. The region is strongest in high-volume IP camera and consumer-security platforms, where cost optimization, rapid product cycles and close cooperation between chip suppliers and device manufacturers are important competitive factors. China also has a growing group of AI-ISP and intelligent-vision semiconductor companies targeting domestic and export security-camera designs. Japan and South Korea maintain relevant processor and imaging capabilities but have fewer specialist merchant suppliers dedicated exclusively to security-camera SoCs.

North America and Israel show a different competitive profile, with greater emphasis on higher-performance edge AI, heterogeneous computing, advanced software frameworks and AI-centric camera architectures. European demand is influenced more strongly by enterprise requirements, cybersecurity, privacy and system integration, while the region has a relatively limited merchant security-camera processor supply base. Emerging Asian markets provide incremental opportunities through expanding commercial, residential and infrastructure security deployment, but semiconductor supply remains more dependent on processors designed elsewhere. Overall, regional differentiation increasingly reflects not simply camera demand, but the balance between volume economics, AI performance, software ecosystems and local supply-chain requirements.

## Competitive Landscape Analysis

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The Security AI Vision Processor market has a layered competitive structure rather than a single uniform peer group. The 26-company Core Formal List includes specialist security-video semiconductor suppliers, diversified edge-computing companies and newer AI-centric processor developers. Suppliers such as SigmaStar, HiSilicon-related Huawei operations, Novatek, Fullhan, Ingenic, Ambarella and Realtek have accumulated substantial camera-processing experience, while Qualcomm, MediaTek, Texas Instruments, NXP and Renesas bring broader computing platforms and extensive development ecosystems into security applications. Hailo, Kneron, Axera and other AI-oriented entrants compete through higher inference efficiency, AI-ISP capabilities and differentiated edge-AI architectures. Competitive advantage therefore depends on the combination of image quality, AI performance per watt, silicon cost, software maturity, sensor support, reference-design completeness and customer relationships rather than peak TOPS alone. Industry boundaries are also becoming less rigid as traditional camera-SoC vendors add larger NPUs and AI-native companies integrate full ISP and video pipelines. Qualcomm's completed acquisition of Augentix in 2026 illustrates this convergence, combining low-power IP-camera semiconductor expertise with a broader edge-AI and connectivity platform. The result is likely to be continued platform integration and selective consolidation while regional specialist suppliers remain competitive in cost-sensitive and application-specific segments.

## Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors

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shaping the global outlook for Security AI Vision Processor 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 Security AI Vision Processor.

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

## Market Segmentation

### Segmentation by Type:

AI Vision SoC

AI Vision Processor

AI Accelerator

### Segmentation by AI Computing Performance:

<1 TOPS

1–5 TOPS

>5–10 TOPS

>10 TOPS

### Segmentation by Maximum Video Resolution:

?2MP / 1080p

>2MP–5MP

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>5MP–8MP / 4K

>8MP

## Segmentation by Power Consumption:

?1 W

>1–3 W

>3–5 W

>5 W

## Segmentation by Application:

Public Safety & Smart City

Industrial Security

Financial Security

Education & Healthcare Security

Other

## This report also splits the market by region:

Americas

United States

Canada

Mexico

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- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey

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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.

SigmaStar Technology Ltd.

Huawei Investment & Holding Co., Ltd.

Qualcomm Incorporated

Novatek Microelectronics Corp.

Realtek Semiconductor Corp.

Ambarella, Inc.

Shanghai Fullhan Microelectronics Co., Ltd.

Beijing Ingenic Integrated Circuit Co., Ltd.

Hunan Goke Microelectronics Co., Ltd.

Rockchip Electronics Co., Ltd.

Allwinner Technology Co., Ltd.

MediaTek Inc.

Axera Semiconductor Co., Ltd.

ASR Microelectronics Co., Ltd.

Kneron, Inc.

Guangzhou Anyka Microelectronics Co., Ltd.

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Eeasy Technology Co., Ltd.

Vimicro Technology Corporation

Hailo Technologies Ltd.

SOPHGO

INNOFUSION SEMICONDUCTOR PTE. LTD.

Eyenix Co., Ltd.

Texas Instruments Incorporated

NXP Semiconductors N.V.

Renesas Electronics Corporation

Synaptics Incorporated

## Key Questions Addressed in this Report

What is the 10-year outlook for the global Security AI Vision Processor market?

What factors are driving Security AI Vision Processor market growth, globally and by region?

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

How do Security AI Vision Processor market opportunities vary by end market size?

How does Security AI Vision Processor break out by Type, by Application?

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# Contents

## 1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

## 2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Security AI Vision Processor Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Security AI Vision Processor by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Security AI Vision Processor by Country/Region, 2021, 2025 & 2032
2.2 Security AI Vision Processor Segment by Type
  2.2.1 AI Vision SoC
  2.2.2 AI Vision Processor
  2.2.3 AI Accelerator
  2.2.4 Security AI Vision Processor Sales by Type
    2.2.4.1 Global Security AI Vision Processor Sales Market Share by Type (2021-2026)
    2.2.4.2 Global Security AI Vision Processor Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global Security AI Vision Processor Sale Price by Type (2021-2026)
2.3 Security AI Vision Processor Segment by AI Computing Performance
  2.3.1 <1 TOPS
  2.3.2 1–5 TOPS
  2.3.3 >5–10 TOPS
  2.3.4 >10 TOPS
  2.3.5 Security AI Vision Processor Sales by AI Computing Performance
    2.3.5.1 Global Security AI Vision Processor Sales Market Share by AI Computing Performance (2021-2026)
    2.3.5.2 Global Security AI Vision Processor Revenue and Market Share by AI

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Computing Performance (2021-2026)
2.3.5.3 Global Security AI Vision Processor Sale Price by AI Computing Performance (2021-2026)
2.4 Security AI Vision Processor Segment by Maximum Video Resolution
2.4.1 ?2MP / 1080p
2.4.2 >2MP–5MP
2.4.3 >5MP–8MP / 4K
2.4.4 >8MP
2.4.5 Security AI Vision Processor Sales by Maximum Video Resolution
2.4.5.1 Global Security AI Vision Processor Sales Market Share by Maximum Video Resolution (2021-2026)
2.4.5.2 Global Security AI Vision Processor Revenue and Market Share by Maximum Video Resolution (2021-2026)
2.4.5.3 Global Security AI Vision Processor Sale Price by Maximum Video Resolution (2021-2026)
2.5 Security AI Vision Processor Segment by Power Consumption
2.5.1 ?1 W
2.5.2 >1–3 W
2.5.3 >3–5 W
2.5.4 >5 W
2.5.5 Security AI Vision Processor Sales by Power Consumption
2.5.5.1 Global Security AI Vision Processor Sales Market Share by Power Consumption (2021-2026)
2.5.5.2 Global Security AI Vision Processor Revenue and Market Share by Power Consumption (2021-2026)
2.5.5.3 Global Security AI Vision Processor Sale Price by Power Consumption (2021-2026)
2.6 Security AI Vision Processor Segment by Application
2.6.1 Public Safety & Smart City
2.6.2 Industrial Security
2.6.3 Financial Security
2.6.4 Education & Healthcare Security
2.6.5 Other
2.6.6 Security AI Vision Processor Sales by Application
2.6.6.1 Global Security AI Vision Processor Sale Market Share by Application (2021-2026)
2.6.6.2 Global Security AI Vision Processor Revenue and Market Share by Application (2021-2026)
2.6.6.3 Global Security AI Vision Processor Sale Price by Application (2021-2026)

+357 96 030922
info@marketpublishers.com

## 3 GLOBAL BY COMPANY

3.1 Global Security AI Vision Processor Breakdown Data by Company
3.1.1 Global Security AI Vision Processor Annual Sales by Company (2021-2026)
3.1.2 Global Security AI Vision Processor Sales Market Share by Company (2021-2026)
3.2 Global Security AI Vision Processor Annual Revenue by Company (2021-2026)
3.2.1 Global Security AI Vision Processor Revenue by Company (2021-2026)
3.2.2 Global Security AI Vision Processor Revenue Market Share by Company (2021-2026)
3.3 Global Security AI Vision Processor Sale Price by Company
3.4 Key Manufacturers Security AI Vision Processor Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Security AI Vision Processor Product Location Distribution
3.4.2 Players Security AI Vision Processor Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

## 4 WORLD HISTORIC REVIEW FOR SECURITY AI VISION PROCESSOR BY GEOGRAPHIC REGION

4.1 World Historic Security AI Vision Processor Market Size by Geographic Region (2021-2026)
4.1.1 Global Security AI Vision Processor Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Security AI Vision Processor Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Security AI Vision Processor Market Size by Country/Region (2021-2026)
4.2.1 Global Security AI Vision Processor Annual Sales by Country/Region (2021-2026)
4.2.2 Global Security AI Vision Processor Annual Revenue by Country/Region (2021-2026)
4.3 Americas Security AI Vision Processor Sales Growth
4.4 APAC Security AI Vision Processor Sales Growth

+357 96 030922
info@marketpublishers.com

4.5 Europe Security AI Vision Processor Sales Growth
4.6 Middle East & Africa Security AI Vision Processor Sales Growth

**5 AMERICAS**

5.1 Americas Security AI Vision Processor Sales by Country
  5.1.1 Americas Security AI Vision Processor Sales by Country (2021-2026)
  5.1.2 Americas Security AI Vision Processor Revenue by Country (2021-2026)
5.2 Americas Security AI Vision Processor Sales by Type (2021-2026)
5.3 Americas Security AI Vision Processor Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

**6 APAC**

6.1 APAC Security AI Vision Processor Sales by Region
  6.1.1 APAC Security AI Vision Processor Sales by Region (2021-2026)
  6.1.2 APAC Security AI Vision Processor Revenue by Region (2021-2026)
6.2 APAC Security AI Vision Processor Sales by Type (2021-2026)
6.3 APAC Security AI Vision Processor Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

**7 EUROPE**

7.1 Europe Security AI Vision Processor by Country
  7.1.1 Europe Security AI Vision Processor Sales by Country (2021-2026)
  7.1.2 Europe Security AI Vision Processor Revenue by Country (2021-2026)
7.2 Europe Security AI Vision Processor Sales by Type (2021-2026)
7.3 Europe Security AI Vision Processor Sales by Application (2021-2026)
7.4 Germany
7.5 France

+357 96 030922
info@marketpublishers.com

7.6 UK
7.7 Italy
7.8 Russia

**8 MIDDLE EAST & AFRICA**

8.1 Middle East & Africa Security AI Vision Processor by Country
  8.1.1 Middle East & Africa Security AI Vision Processor Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Security AI Vision Processor Revenue by Country (2021-2026)
8.2 Middle East & Africa Security AI Vision Processor Sales by Type (2021-2026)
8.3 Middle East & Africa Security AI Vision Processor Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

**9 MARKET DRIVERS, CHALLENGES AND TRENDS**

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

**10 MANUFACTURING COST STRUCTURE ANALYSIS**

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Security AI Vision Processor
10.3 Manufacturing Process Analysis of Security AI Vision Processor
10.4 Industry Chain Structure of Security AI Vision Processor

**11 MARKETING, DISTRIBUTORS AND CUSTOMER**

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Security AI Vision Processor Distributors
11.3 Security AI Vision Processor Customer

+357 96 030922
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## 12 WORLD FORECAST REVIEW FOR SECURITY AI VISION PROCESSOR BY GEOGRAPHIC REGION

12.1 Global Security AI Vision Processor Market Size Forecast by Region
12.1.1 Global Security AI Vision Processor Forecast by Region (2027-2032)
12.1.2 Global Security AI Vision Processor Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Security AI Vision Processor Forecast by Type (2027-2032)
12.7 Global Security AI Vision Processor Forecast by Application (2027-2032)

## 13 KEY PLAYERS ANALYSIS

13.1 SigmaStar Technology Ltd.
13.1.1 SigmaStar Technology Ltd. Company Information
13.1.2 SigmaStar Technology Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.1.3 SigmaStar Technology Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 SigmaStar Technology Ltd. Main Business Overview
13.1.5 SigmaStar Technology Ltd. Latest Developments
13.2 Huawei Investment & Holding Co., Ltd.
13.2.1 Huawei Investment & Holding Co., Ltd. Company Information
13.2.2 Huawei Investment & Holding Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.2.3 Huawei Investment & Holding Co., Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Huawei Investment & Holding Co., Ltd. Main Business Overview
13.2.5 Huawei Investment & Holding Co., Ltd. Latest Developments
13.3 Qualcomm Incorporated
13.3.1 Qualcomm Incorporated Company Information
13.3.2 Qualcomm Incorporated Security AI Vision Processor Product Portfolios and Specifications
13.3.3 Qualcomm Incorporated Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Qualcomm Incorporated Main Business Overview

+357 96 030922
info@marketpublishers.com

13.3.5 Qualcomm Incorporated Latest Developments
13.4 Novatek Microelectronics Corp.
13.4.1 Novatek Microelectronics Corp. Company Information
13.4.2 Novatek Microelectronics Corp. Security AI Vision Processor Product Portfolios and Specifications
13.4.3 Novatek Microelectronics Corp. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Novatek Microelectronics Corp. Main Business Overview
13.4.5 Novatek Microelectronics Corp. Latest Developments
13.5 Realtek Semiconductor Corp.
13.5.1 Realtek Semiconductor Corp. Company Information
13.5.2 Realtek Semiconductor Corp. Security AI Vision Processor Product Portfolios and Specifications
13.5.3 Realtek Semiconductor Corp. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Realtek Semiconductor Corp. Main Business Overview
13.5.5 Realtek Semiconductor Corp. Latest Developments
13.6 Ambarella, Inc.
13.6.1 Ambarella, Inc. Company Information
13.6.2 Ambarella, Inc. Security AI Vision Processor Product Portfolios and Specifications
13.6.3 Ambarella, Inc. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Ambarella, Inc. Main Business Overview
13.6.5 Ambarella, Inc. Latest Developments
13.7 Shanghai Fullhan Microelectronics Co., Ltd.
13.7.1 Shanghai Fullhan Microelectronics Co., Ltd. Company Information
13.7.2 Shanghai Fullhan Microelectronics Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.7.3 Shanghai Fullhan Microelectronics Co., Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Shanghai Fullhan Microelectronics Co., Ltd. Main Business Overview
13.7.5 Shanghai Fullhan Microelectronics Co., Ltd. Latest Developments
13.8 Beijing Ingenic Integrated Circuit Co., Ltd.
13.8.1 Beijing Ingenic Integrated Circuit Co., Ltd. Company Information
13.8.2 Beijing Ingenic Integrated Circuit Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.8.3 Beijing Ingenic Integrated Circuit Co., Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)

+357 96 030922
info@marketpublishers.com

13.8.4 Beijing Ingenic Integrated Circuit Co., Ltd. Main Business Overview
13.8.5 Beijing Ingenic Integrated Circuit Co., Ltd. Latest Developments
13.9 Hunan Goke Microelectronics Co., Ltd.
13.9.1 Hunan Goke Microelectronics Co., Ltd. Company Information
13.9.2 Hunan Goke Microelectronics Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.9.3 Hunan Goke Microelectronics Co., Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Hunan Goke Microelectronics Co., Ltd. Main Business Overview
13.9.5 Hunan Goke Microelectronics Co., Ltd. Latest Developments
13.10 Rockchip Electronics Co., Ltd.
13.10.1 Rockchip Electronics Co., Ltd. Company Information
13.10.2 Rockchip Electronics Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.10.3 Rockchip Electronics Co., Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Rockchip Electronics Co., Ltd. Main Business Overview
13.10.5 Rockchip Electronics Co., Ltd. Latest Developments
13.11 Allwinner Technology Co., Ltd.
13.11.1 Allwinner Technology Co., Ltd. Company Information
13.11.2 Allwinner Technology Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.11.3 Allwinner Technology Co., Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Allwinner Technology Co., Ltd. Main Business Overview
13.11.5 Allwinner Technology Co., Ltd. Latest Developments
13.12 MediaTek Inc.
13.12.1 MediaTek Inc. Company Information
13.12.2 MediaTek Inc. Security AI Vision Processor Product Portfolios and Specifications
13.12.3 MediaTek Inc. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 MediaTek Inc. Main Business Overview
13.12.5 MediaTek Inc. Latest Developments
13.13 Axera Semiconductor Co., Ltd.
13.13.1 Axera Semiconductor Co., Ltd. Company Information
13.13.2 Axera Semiconductor Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.13.3 Axera Semiconductor Co., Ltd. Security AI Vision Processor Sales, Revenue,

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Price and Gross Margin (2021-2026)
13.13.4 Axera Semiconductor Co., Ltd. Main Business Overview
13.13.5 Axera Semiconductor Co., Ltd. Latest Developments
13.14 ASR Microelectronics Co., Ltd.
13.14.1 ASR Microelectronics Co., Ltd. Company Information
13.14.2 ASR Microelectronics Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.14.3 ASR Microelectronics Co., Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 ASR Microelectronics Co., Ltd. Main Business Overview
13.14.5 ASR Microelectronics Co., Ltd. Latest Developments
13.15 Kneron, Inc.
13.15.1 Kneron, Inc. Company Information
13.15.2 Kneron, Inc. Security AI Vision Processor Product Portfolios and Specifications
13.15.3 Kneron, Inc. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Kneron, Inc. Main Business Overview
13.15.5 Kneron, Inc. Latest Developments
13.16 Guangzhou Anyka Microelectronics Co., Ltd.
13.16.1 Guangzhou Anyka Microelectronics Co., Ltd. Company Information
13.16.2 Guangzhou Anyka Microelectronics Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.16.3 Guangzhou Anyka Microelectronics Co., Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Guangzhou Anyka Microelectronics Co., Ltd. Main Business Overview
13.16.5 Guangzhou Anyka Microelectronics Co., Ltd. Latest Developments
13.17 Eeasy Technology Co., Ltd.
13.17.1 Eeasy Technology Co., Ltd. Company Information
13.17.2 Eeasy Technology Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.17.3 Eeasy Technology Co., Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Eeasy Technology Co., Ltd. Main Business Overview
13.17.5 Eeasy Technology Co., Ltd. Latest Developments
13.18 Vimicro Technology Corporation
13.18.1 Vimicro Technology Corporation Company Information
13.18.2 Vimicro Technology Corporation Security AI Vision Processor Product Portfolios and Specifications

+357 96 030922
info@marketpublishers.com

13.18.3 Vimicro Technology Corporation Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Vimicro Technology Corporation Main Business Overview
13.18.5 Vimicro Technology Corporation Latest Developments
13.19 Hailo Technologies Ltd.
13.19.1 Hailo Technologies Ltd. Company Information
13.19.2 Hailo Technologies Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.19.3 Hailo Technologies Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Hailo Technologies Ltd. Main Business Overview
13.19.5 Hailo Technologies Ltd. Latest Developments
13.20 SOPHGO
13.20.1 SOPHGO Company Information
13.20.2 SOPHGO Security AI Vision Processor Product Portfolios and Specifications
13.20.3 SOPHGO Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 SOPHGO Main Business Overview
13.20.5 SOPHGO Latest Developments
13.21 INNOFUSION SEMICONDUCTOR PTE. LTD.
13.21.1 INNOFUSION SEMICONDUCTOR PTE. LTD. Company Information
13.21.2 INNOFUSION SEMICONDUCTOR PTE. LTD. Security AI Vision Processor Product Portfolios and Specifications
13.21.3 INNOFUSION SEMICONDUCTOR PTE. LTD. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 INNOFUSION SEMICONDUCTOR PTE. LTD. Main Business Overview
13.21.5 INNOFUSION SEMICONDUCTOR PTE. LTD. Latest Developments
13.22 Eyenix Co., Ltd.
13.22.1 Eyenix Co., Ltd. Company Information
13.22.2 Eyenix Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
13.22.3 Eyenix Co., Ltd. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 Eyenix Co., Ltd. Main Business Overview
13.22.5 Eyenix Co., Ltd. Latest Developments
13.23 Texas Instruments Incorporated
13.23.1 Texas Instruments Incorporated Company Information
13.23.2 Texas Instruments Incorporated Security AI Vision Processor Product Portfolios and Specifications

+357 96 030922
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13.23.3 Texas Instruments Incorporated Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.23.4 Texas Instruments Incorporated Main Business Overview
13.23.5 Texas Instruments Incorporated Latest Developments
13.24 NXP Semiconductors N.V.
13.24.1 NXP Semiconductors N.V. Company Information
13.24.2 NXP Semiconductors N.V. Security AI Vision Processor Product Portfolios and Specifications
13.24.3 NXP Semiconductors N.V. Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.24.4 NXP Semiconductors N.V. Main Business Overview
13.24.5 NXP Semiconductors N.V. Latest Developments
13.25 Renesas Electronics Corporation
13.25.1 Renesas Electronics Corporation Company Information
13.25.2 Renesas Electronics Corporation Security AI Vision Processor Product Portfolios and Specifications
13.25.3 Renesas Electronics Corporation Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.25.4 Renesas Electronics Corporation Main Business Overview
13.25.5 Renesas Electronics Corporation Latest Developments
13.26 Synaptics Incorporated
13.26.1 Synaptics Incorporated Company Information
13.26.2 Synaptics Incorporated Security AI Vision Processor Product Portfolios and Specifications
13.26.3 Synaptics Incorporated Security AI Vision Processor Sales, Revenue, Price and Gross Margin (2021-2026)
13.26.4 Synaptics Incorporated Main Business Overview
13.26.5 Synaptics Incorporated Latest Developments

**14 RESEARCH FINDINGS AND CONCLUSION**

+357 96 030922
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# List Of Tables

## LIST OF TABLES

Table 1. Security AI Vision Processor Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Security AI Vision Processor Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of AI Vision SoC
Table 4. Major Players of AI Vision Processor
Table 5. Major Players of AI Accelerator
Table 6. Global Security AI Vision Processor Sales by Type (2021-2026) & (Million Units)
Table 7. Global Security AI Vision Processor Sales Market Share by Type (2021-2026)
Table 8. Global Security AI Vision Processor Revenue by Type (2021-2026) & ($ million)
Table 9. Global Security AI Vision Processor Revenue Market Share by Type (2021-2026)
Table 10. Global Security AI Vision Processor Sale Price by Type (2021-2026) & (US$/Unit)
Table 11. Major Players of <1 TOPS
Table 12. Major Players of 1–5 TOPS
Table 13. Major Players of >5–10 TOPS
Table 14. Major Players of >10 TOPS
Table 15. Global Security AI Vision Processor Sales by AI Computing Performance (2021-2026) & (Million Units)
Table 16. Global Security AI Vision Processor Sales Market Share by AI Computing Performance (2021-2026)
Table 17. Global Security AI Vision Processor Revenue by AI Computing Performance (2021-2026) & ($ million)
Table 18. Global Security AI Vision Processor Revenue Market Share by AI Computing Performance (2021-2026)
Table 19. Global Security AI Vision Processor Sale Price by AI Computing Performance (2021-2026) & (US$/Unit)
Table 20. Major Players of ?2MP / 1080p
Table 21. Major Players of >2MP–5MP
Table 22. Major Players of >5MP–8MP / 4K
Table 23. Major Players of >8MP
Table 24. Global Security AI Vision Processor Sales by Maximum Video Resolution

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(2021-2026) & (Million Units)
Table 25. Global Security AI Vision Processor Sales Market Share by Maximum Video Resolution (2021-2026)
Table 26. Global Security AI Vision Processor Revenue by Maximum Video Resolution (2021-2026) & ($ million)
Table 27. Global Security AI Vision Processor Revenue Market Share by Maximum Video Resolution (2021-2026)
Table 28. Global Security AI Vision Processor Sale Price by Maximum Video Resolution (2021-2026) & (US$/Unit)
Table 29. Major Players of ?1 W
Table 30. Major Players of >1–3 W
Table 31. Major Players of >3–5 W
Table 32. Major Players of >5 W
Table 33. Global Security AI Vision Processor Sales by Power Consumption (2021-2026) & (Million Units)
Table 34. Global Security AI Vision Processor Sales Market Share by Power Consumption (2021-2026)
Table 35. Global Security AI Vision Processor Revenue by Power Consumption (2021-2026) & ($ million)
Table 36. Global Security AI Vision Processor Revenue Market Share by Power Consumption (2021-2026)
Table 37. Global Security AI Vision Processor Sale Price by Power Consumption (2021-2026) & (US$/Unit)
Table 38. Global Security AI Vision Processor Sale by Application (2021-2026) & (Million Units)
Table 39. Global Security AI Vision Processor Sale Market Share by Application (2021-2026)
Table 40. Global Security AI Vision Processor Revenue by Application (2021-2026) & ($ million)
Table 41. Global Security AI Vision Processor Revenue Market Share by Application (2021-2026)
Table 42. Global Security AI Vision Processor Sale Price by Application (2021-2026) & (US$/Unit)
Table 43. Global Security AI Vision Processor Sales by Company (2021-2026) & (Million Units)
Table 44. Global Security AI Vision Processor Sales Market Share by Company (2021-2026)
Table 45. Global Security AI Vision Processor Revenue by Company (2021-2026) & ($ millions)

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Table 46. Global Security AI Vision Processor Revenue Market Share by Company (2021-2026)
Table 47. Global Security AI Vision Processor Sale Price by Company (2021-2026) & (US$/Unit)
Table 48. Key Manufacturers Security AI Vision Processor Producing Area Distribution and Sales Area
Table 49. Players Security AI Vision Processor Products Offered
Table 50. Security AI Vision Processor Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 51. New Products and Potential Entrants
Table 52. Market M&A Activity & Strategy
Table 53. Global Security AI Vision Processor Sales by Geographic Region (2021-2026) & (Million Units)
Table 54. Global Security AI Vision Processor Sales Market Share Geographic Region (2021-2026)
Table 55. Global Security AI Vision Processor Revenue by Geographic Region (2021-2026) & ($ millions)
Table 56. Global Security AI Vision Processor Revenue Market Share by Geographic Region (2021-2026)
Table 57. Global Security AI Vision Processor Sales by Country/Region (2021-2026) & (Million Units)
Table 58. Global Security AI Vision Processor Sales Market Share by Country/Region (2021-2026)
Table 59. Global Security AI Vision Processor Revenue by Country/Region (2021-2026) & ($ millions)
Table 60. Global Security AI Vision Processor Revenue Market Share by Country/Region (2021-2026)
Table 61. Americas Security AI Vision Processor Sales by Country (2021-2026) & (Million Units)
Table 62. Americas Security AI Vision Processor Sales Market Share by Country (2021-2026)
Table 63. Americas Security AI Vision Processor Revenue by Country (2021-2026) & ($ millions)
Table 64. Americas Security AI Vision Processor Sales by Type (2021-2026) & (Million Units)
Table 65. Americas Security AI Vision Processor Sales by Application (2021-2026) & (Million Units)
Table 66. APAC Security AI Vision Processor Sales by Region (2021-2026) & (Million Units)

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Table 67. APAC Security AI Vision Processor Sales Market Share by Region (2021-2026)
Table 68. APAC Security AI Vision Processor Revenue by Region (2021-2026) & ($ millions)
Table 69. APAC Security AI Vision Processor Sales by Type (2021-2026) & (Million Units)
Table 70. APAC Security AI Vision Processor Sales by Application (2021-2026) & (Million Units)
Table 71. Europe Security AI Vision Processor Sales by Country (2021-2026) & (Million Units)
Table 72. Europe Security AI Vision Processor Revenue by Country (2021-2026) & ($ millions)
Table 73. Europe Security AI Vision Processor Sales by Type (2021-2026) & (Million Units)
Table 74. Europe Security AI Vision Processor Sales by Application (2021-2026) & (Million Units)
Table 75. Middle East & Africa Security AI Vision Processor Sales by Country (2021-2026) & (Million Units)
Table 76. Middle East & Africa Security AI Vision Processor Revenue Market Share by Country (2021-2026)
Table 77. Middle East & Africa Security AI Vision Processor Sales by Type (2021-2026) & (Million Units)
Table 78. Middle East & Africa Security AI Vision Processor Sales by Application (2021-2026) & (Million Units)
Table 79. Key Market Drivers & Growth Opportunities of Security AI Vision Processor
Table 80. Key Market Challenges & Risks of Security AI Vision Processor
Table 81. Key Industry Trends of Security AI Vision Processor
Table 82. Security AI Vision Processor Raw Material
Table 83. Key Suppliers of Raw Materials
Table 84. Security AI Vision Processor Distributors List
Table 85. Security AI Vision Processor Customer List
Table 86. Global Security AI Vision Processor Sales Forecast by Region (2027-2032) & (Million Units)
Table 87. Global Security AI Vision Processor Revenue Forecast by Region (2027-2032) & ($ millions)
Table 88. Americas Security AI Vision Processor Sales Forecast by Country (2027-2032) & (Million Units)
Table 89. Americas Security AI Vision Processor Annual Revenue Forecast by Country (2027-2032) & ($ millions)

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Table 90. APAC Security AI Vision Processor Sales Forecast by Region (2027-2032) & (Million Units)
Table 91. APAC Security AI Vision Processor Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 92. Europe Security AI Vision Processor Sales Forecast by Country (2027-2032) & (Million Units)
Table 93. Europe Security AI Vision Processor Revenue Forecast by Country (2027-2032) & ($ millions)
Table 94. Middle East & Africa Security AI Vision Processor Sales Forecast by Country (2027-2032) & (Million Units)
Table 95. Middle East & Africa Security AI Vision Processor Revenue Forecast by Country (2027-2032) & ($ millions)
Table 96. Global Security AI Vision Processor Sales Forecast by Type (2027-2032) & (Million Units)
Table 97. Global Security AI Vision Processor Revenue Forecast by Type (2027-2032) & ($ millions)
Table 98. Global Security AI Vision Processor Sales Forecast by Application (2027-2032) & (Million Units)
Table 99. Global Security AI Vision Processor Revenue Forecast by Application (2027-2032) & ($ millions)
Table 100. SigmaStar Technology Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 101. SigmaStar Technology Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 102. SigmaStar Technology Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 103. SigmaStar Technology Ltd. Main Business
Table 104. SigmaStar Technology Ltd. Latest Developments
Table 105. Huawei Investment & Holding Co., Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 106. Huawei Investment & Holding Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 107. Huawei Investment & Holding Co., Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 108. Huawei Investment & Holding Co., Ltd. Main Business
Table 109. Huawei Investment & Holding Co., Ltd. Latest Developments
Table 110. Qualcomm Incorporated Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 111. Qualcomm Incorporated Security AI Vision Processor Product Portfolios and

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Specifications
Table 112. Qualcomm Incorporated Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 113. Qualcomm Incorporated Main Business
Table 114. Qualcomm Incorporated Latest Developments
Table 115. Novatek Microelectronics Corp. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 116. Novatek Microelectronics Corp. Security AI Vision Processor Product Portfolios and Specifications
Table 117. Novatek Microelectronics Corp. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 118. Novatek Microelectronics Corp. Main Business
Table 119. Novatek Microelectronics Corp. Latest Developments
Table 120. Realtek Semiconductor Corp. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 121. Realtek Semiconductor Corp. Security AI Vision Processor Product Portfolios and Specifications
Table 122. Realtek Semiconductor Corp. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 123. Realtek Semiconductor Corp. Main Business
Table 124. Realtek Semiconductor Corp. Latest Developments
Table 125. Ambarella, Inc. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 126. Ambarella, Inc. Security AI Vision Processor Product Portfolios and Specifications
Table 127. Ambarella, Inc. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 128. Ambarella, Inc. Main Business
Table 129. Ambarella, Inc. Latest Developments
Table 130. Shanghai Fullhan Microelectronics Co., Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 131. Shanghai Fullhan Microelectronics Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 132. Shanghai Fullhan Microelectronics Co., Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 133. Shanghai Fullhan Microelectronics Co., Ltd. Main Business
Table 134. Shanghai Fullhan Microelectronics Co., Ltd. Latest Developments
Table 135. Beijing Ingenic Integrated Circuit Co., Ltd. Basic Information, Security AI

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Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 136. Beijing Ingenic Integrated Circuit Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 137. Beijing Ingenic Integrated Circuit Co., Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 138. Beijing Ingenic Integrated Circuit Co., Ltd. Main Business
Table 139. Beijing Ingenic Integrated Circuit Co., Ltd. Latest Developments
Table 140. Hunan Goke Microelectronics Co., Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 141. Hunan Goke Microelectronics Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 142. Hunan Goke Microelectronics Co., Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 143. Hunan Goke Microelectronics Co., Ltd. Main Business
Table 144. Hunan Goke Microelectronics Co., Ltd. Latest Developments
Table 145. Rockchip Electronics Co., Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 146. Rockchip Electronics Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 147. Rockchip Electronics Co., Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 148. Rockchip Electronics Co., Ltd. Main Business
Table 149. Rockchip Electronics Co., Ltd. Latest Developments
Table 150. Allwinner Technology Co., Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 151. Allwinner Technology Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 152. Allwinner Technology Co., Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 153. Allwinner Technology Co., Ltd. Main Business
Table 154. Allwinner Technology Co., Ltd. Latest Developments
Table 155. MediaTek Inc. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 156. MediaTek Inc. Security AI Vision Processor Product Portfolios and Specifications
Table 157. MediaTek Inc. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 158. MediaTek Inc. Main Business

+357 96 030922
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Table 159. MediaTek Inc. Latest Developments
Table 160. Axera Semiconductor Co., Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 161. Axera Semiconductor Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 162. Axera Semiconductor Co., Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 163. Axera Semiconductor Co., Ltd. Main Business
Table 164. Axera Semiconductor Co., Ltd. Latest Developments
Table 165. ASR Microelectronics Co., Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 166. ASR Microelectronics Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 167. ASR Microelectronics Co., Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 168. ASR Microelectronics Co., Ltd. Main Business
Table 169. ASR Microelectronics Co., Ltd. Latest Developments
Table 170. Kneron, Inc. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 171. Kneron, Inc. Security AI Vision Processor Product Portfolios and Specifications
Table 172. Kneron, Inc. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 173. Kneron, Inc. Main Business
Table 174. Kneron, Inc. Latest Developments
Table 175. Guangzhou Anyka Microelectronics Co., Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 176. Guangzhou Anyka Microelectronics Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 177. Guangzhou Anyka Microelectronics Co., Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 178. Guangzhou Anyka Microelectronics Co., Ltd. Main Business
Table 179. Guangzhou Anyka Microelectronics Co., Ltd. Latest Developments
Table 180. Eeasy Technology Co., Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 181. Eeasy Technology Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 182. Eeasy Technology Co., Ltd. Security AI Vision Processor Sales (Million

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Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 183. Eeasy Technology Co., Ltd. Main Business
Table 184. Eeasy Technology Co., Ltd. Latest Developments
Table 185. Vimicro Technology Corporation Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 186. Vimicro Technology Corporation Security AI Vision Processor Product Portfolios and Specifications
Table 187. Vimicro Technology Corporation Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 188. Vimicro Technology Corporation Main Business
Table 189. Vimicro Technology Corporation Latest Developments
Table 190. Hailo Technologies Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 191. Hailo Technologies Ltd. Security AI Vision Processor Product Portfolios and Specifications
Table 192. Hailo Technologies Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 193. Hailo Technologies Ltd. Main Business
Table 194. Hailo Technologies Ltd. Latest Developments
Table 195. SOPHGO Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 196. SOPHGO Security AI Vision Processor Product Portfolios and Specifications
Table 197. SOPHGO Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 198. SOPHGO Main Business
Table 199. SOPHGO Latest Developments
Table 200. INNOFUSION SEMICONDUCTOR PTE. LTD. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 201. INNOFUSION SEMICONDUCTOR PTE. LTD. Security AI Vision Processor Product Portfolios and Specifications
Table 202. INNOFUSION SEMICONDUCTOR PTE. LTD. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 203. INNOFUSION SEMICONDUCTOR PTE. LTD. Main Business
Table 204. INNOFUSION SEMICONDUCTOR PTE. LTD. Latest Developments
Table 205. Eyenix Co., Ltd. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 206. Eyenix Co., Ltd. Security AI Vision Processor Product Portfolios and Specifications

+357 96 030922
info@marketpublishers.com

Table 207. Eyenix Co., Ltd. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 208. Eyenix Co., Ltd. Main Business
Table 209. Eyenix Co., Ltd. Latest Developments
Table 210. Texas Instruments Incorporated Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 211. Texas Instruments Incorporated Security AI Vision Processor Product Portfolios and Specifications
Table 212. Texas Instruments Incorporated Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 213. Texas Instruments Incorporated Main Business
Table 214. Texas Instruments Incorporated Latest Developments
Table 215. NXP Semiconductors N.V. Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 216. NXP Semiconductors N.V. Security AI Vision Processor Product Portfolios and Specifications
Table 217. NXP Semiconductors N.V. Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 218. NXP Semiconductors N.V. Main Business
Table 219. NXP Semiconductors N.V. Latest Developments
Table 220. Renesas Electronics Corporation Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 221. Renesas Electronics Corporation Security AI Vision Processor Product Portfolios and Specifications
Table 222. Renesas Electronics Corporation Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 223. Renesas Electronics Corporation Main Business
Table 224. Renesas Electronics Corporation Latest Developments
Table 225. Synaptics Incorporated Basic Information, Security AI Vision Processor Manufacturing Base, Sales Area and Its Competitors
Table 226. Synaptics Incorporated Security AI Vision Processor Product Portfolios and Specifications
Table 227. Synaptics Incorporated Security AI Vision Processor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 228. Synaptics Incorporated Main Business
Table 229. Synaptics Incorporated Latest Developments

+357 96 030922
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# List Of Figures

## LIST OF FIGURES

Figure 1. Picture of Security AI Vision Processor
Figure 2. Security AI Vision Processor Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Security AI Vision Processor Sales Growth Rate 2021-2032 (Million Units)
Figure 7. Global Security AI Vision Processor Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Security AI Vision Processor Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Security AI Vision Processor Sales Market Share by Country/Region (2025)
Figure 10. Security AI Vision Processor Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of AI Vision SoC
Figure 12. Product Picture of AI Vision Processor
Figure 13. Product Picture of AI Accelerator
Figure 14. Global Security AI Vision Processor Sales Market Share by Type in 2026
Figure 15. Global Security AI Vision Processor Revenue Market Share by Type (2021-2026)
Figure 16. Product Picture of <1 TOPS
Figure 17. Product Picture of 1–5 TOPS
Figure 18. Product Picture of >5–10 TOPS
Figure 19. Product Picture of >10 TOPS
Figure 20. Global Security AI Vision Processor Sales Market Share by AI Computing Performance in 2026
Figure 21. Global Security AI Vision Processor Revenue Market Share by AI Computing Performance (2021-2026)
Figure 22. Product Picture of ?2MP / 1080p
Figure 23. Product Picture of >2MP–5MP
Figure 24. Product Picture of >5MP–8MP / 4K
Figure 25. Product Picture of >8MP
Figure 26. Global Security AI Vision Processor Sales Market Share by Maximum Video Resolution in 2026
Figure 27. Global Security AI Vision Processor Revenue Market Share by Maximum

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Video Resolution (2021-2026)
Figure 28. Product Picture of ?1 W
Figure 29. Product Picture of >1–3 W
Figure 30. Product Picture of >3–5 W
Figure 31. Product Picture of >5 W
Figure 32. Global Security AI Vision Processor Sales Market Share by Power Consumption in 2026
Figure 33. Global Security AI Vision Processor Revenue Market Share by Power Consumption (2021-2026)
Figure 34. Security AI Vision Processor Consumed in Public Safety & Smart City
Figure 35. Global Security AI Vision Processor Market: Public Safety & Smart City (2021-2026) & (Million Units)
Figure 36. Security AI Vision Processor Consumed in Industrial Security
Figure 37. Global Security AI Vision Processor Market: Industrial Security (2021-2026) & (Million Units)
Figure 38. Security AI Vision Processor Consumed in Financial Security
Figure 39. Global Security AI Vision Processor Market: Financial Security (2021-2026) & (Million Units)
Figure 40. Security AI Vision Processor Consumed in Education & Healthcare Security
Figure 41. Global Security AI Vision Processor Market: Education & Healthcare Security (2021-2026) & (Million Units)
Figure 42. Security AI Vision Processor Consumed in Other
Figure 43. Global Security AI Vision Processor Market: Other (2021-2026) & (Million Units)
Figure 44. Global Security AI Vision Processor Sale Market Share by Application (2025)
Figure 45. Global Security AI Vision Processor Revenue Market Share by Application in 2025
Figure 46. Security AI Vision Processor Sales by Company in 2025 (Million Units)
Figure 47. Global Security AI Vision Processor Sales Market Share by Company in 2025
Figure 48. Security AI Vision Processor Revenue by Company in 2025 ($ millions)
Figure 49. Global Security AI Vision Processor Revenue Market Share by Company in 2025
Figure 50. Global Security AI Vision Processor Sales Market Share by Geographic Region (2021-2026)
Figure 51. Global Security AI Vision Processor Revenue Market Share by Geographic Region in 2025
Figure 52. Americas Security AI Vision Processor Sales 2021-2026 (Million Units)
Figure 53. Americas Security AI Vision Processor Revenue 2021-2026 ($ millions)

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Figure 54. APAC Security AI Vision Processor Sales 2021-2026 (Million Units)
Figure 55. APAC Security AI Vision Processor Revenue 2021-2026 ($ millions)
Figure 56. Europe Security AI Vision Processor Sales 2021-2026 (Million Units)
Figure 57. Europe Security AI Vision Processor Revenue 2021-2026 ($ millions)
Figure 58. Middle East & Africa Security AI Vision Processor Sales 2021-2026 (Million Units)
Figure 59. Middle East & Africa Security AI Vision Processor Revenue 2021-2026 ($ millions)
Figure 60. Americas Security AI Vision Processor Sales Market Share by Country in 2025
Figure 61. Americas Security AI Vision Processor Revenue Market Share by Country (2021-2026)
Figure 62. Americas Security AI Vision Processor Sales Market Share by Type (2021-2026)
Figure 63. Americas Security AI Vision Processor Sales Market Share by Application (2021-2026)
Figure 64. United States Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 65. Canada Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 66. Mexico Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 67. Brazil Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 68. APAC Security AI Vision Processor Sales Market Share by Region in 2025
Figure 69. APAC Security AI Vision Processor Revenue Market Share by Region (2021-2026)
Figure 70. APAC Security AI Vision Processor Sales Market Share by Type (2021-2026)
Figure 71. APAC Security AI Vision Processor Sales Market Share by Application (2021-2026)
Figure 72. China Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 73. Japan Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 74. South Korea Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 75. Southeast Asia Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 76. India Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 77. Australia Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 78. China Taiwan Security AI Vision Processor Revenue Growth 2021-2026 ($

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millions)
Figure 79. Europe Security AI Vision Processor Sales Market Share by Country in 2025
Figure 80. Europe Security AI Vision Processor Revenue Market Share by Country (2021-2026)
Figure 81. Europe Security AI Vision Processor Sales Market Share by Type (2021-2026)
Figure 82. Europe Security AI Vision Processor Sales Market Share by Application (2021-2026)
Figure 83. Germany Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 84. France Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 85. UK Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 86. Italy Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 87. Russia Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 88. Middle East & Africa Security AI Vision Processor Sales Market Share by Country (2021-2026)
Figure 89. Middle East & Africa Security AI Vision Processor Sales Market Share by Type (2021-2026)
Figure 90. Middle East & Africa Security AI Vision Processor Sales Market Share by Application (2021-2026)
Figure 91. Egypt Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 92. South Africa Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 93. Israel Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 94. Turkey Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 95. GCC Countries Security AI Vision Processor Revenue Growth 2021-2026 ($ millions)
Figure 96. Manufacturing Cost Structure Analysis of Security AI Vision Processor in 2026
Figure 97. Manufacturing Process Analysis of Security AI Vision Processor
Figure 98. Industry Chain Structure of Security AI Vision Processor
Figure 99. Channels of Distribution
Figure 100. Global Security AI Vision Processor Sales Market Forecast by Region (2027-2032)
Figure 101. Global Security AI Vision Processor Revenue Market Share Forecast by Region (2027-2032)
Figure 102. Global Security AI Vision Processor Sales Market Share Forecast by Type (2027-2032)
Figure 103. Global Security AI Vision Processor Revenue Market Share Forecast by

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Type (2027-2032)
Figure 104. Global Security AI Vision Processor Sales Market Share Forecast by Application (2027-2032)
Figure 105. Global Security AI Vision Processor Revenue Market Share Forecast by Application (2027-2032)

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