

Embedded AI Market by Offering (Hardware, Software, Services), Data Type (Numerical Data, Categorical Data, Image & Video Data), Vertical (Automotive, Manufacturing, Healthcare & Life Sciences, Telecom), and Region - Global Forecast to 2028

Market Report | 2023-06-22 | 319 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The Embedded AI market is projected to grow from USD 9.4 billion in 2023 to USD 18.0 billion by 2028 at a compound annual growth rate (CAGR) of 14.0% during the forecast period. The market is anticipated to grow due to the growing demand for intelligent and autonomous systems for a personalized experience and increasing advancements in AI and ML technologies for better and smart decisions.

By offering the hardware segment to hold the largest market size during the forecast period

The hardware segment of the embedded AI market is growing rapidly due to the increasing demand for AI-powered devices and applications. Embedded AI hardware plays a critical role in the market by providing the necessary computing power and specialized capabilities to support AI applications directly on embedded systems. Embedded AI hardware can be customized and integrated into specific embedded systems, ensuring seamless compatibility and efficient utilization of resources. This allows hardware vendors and system designers to tailor the AI hardware to meet the specific requirements of the target application, achieving optimal performance and functionality.

By vertical, the healthcare and life sciences segment to have the highest CAGR during the forecast period

Across the healthcare and life science sector, embedded AI is used in medical devices and equipment for diagnostics, patient monitoring, personalized medicine, and data analysis. AI algorithms embedded in medical devices help in the early detection of diseases, decision support for clinicians, and remote patient monitoring. Embedded AI adoption in the healthcare and life sciences industry has grown rapidly, driven by the potential to improve patient outcomes, enhance efficiency, and enable personalized medicine.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

North America to witness fastest growing market size during the forecast period

North America is experiencing significant technological growth in the Embedded AI market, driven by various factors shaping the landscape of intelligent and connected devices. Embedded AI adoption in North America is gaining momentum across industries, driven by technological advancements, the rise of IoT, a supportive ecosystem, and increasing awareness of its benefits. The region is witnessing a proliferation of intelligent edge devices and innovative applications that leverage Embedded AI, contributing to the transformation of various

Breakdown of primaries

In-depth interviews were conducted with Chief Executive Officers (CEOs), innovation and technology directors, system integrators, and executives from various key organizations operating in the social media management market.

-□By Company: Tier I: 38%, Tier II: 50%, and Tier III: 12%

-□By Designation: C-Level Executives: 35%, D-Level Executives: 40%, and Managers: 25%

-□By Region: North America: 40%, Asia Pacific: 20%, Europe: 30%, and Middle East Africa: 5% and Latin America- 5%

The report includes the study of key players offering embedded AI solutions. It profiles major vendors in the Embedded AI market.

The major players in the Embedded AI market include Google (US), IBM (US), Microsoft (US), AWS (US), NVIDIA (US), Intel (US), Qualcomm (US), Arm (UK), AMD (US), MediaTek (Taiwan), Oracle (US), Salesforce (US), NXP (Netherlands), Lattice (Oregon), Octonion (Switzerland), NeuroPace (US), Siemens (Germany), HPE (US), LUIS Technology (Germany), Code Time Technologies (Canada), HiSilicon (China), VectorBlox (Canada), Au-Zone Technologies (Canada), STMicroelectronics (Switzerland), SenseTime (Hong Kong), Edge Impulse (US), Perceive (US), Eta Compute (US), SensiML (US), Syntiant (US), Graphcore (UK), and SiMa.ai (US).

Research coverage

The research study for the Embedded AI market involved extensive secondary sources, directories, journals, and paid databases. Primary sources were mainly industry experts from the core and related industries, preferred embedded AI providers, third-party service providers, consulting service providers, end users, and other commercial enterprises. In-depth interviews were conducted with various primary respondents, including key industry participants and subject matter experts, to obtain and verify critical qualitative and quantitative information, and assess the market's prospects.

Key Benefits of Buying the Report

The report would provide the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall Embedded AI market and its subsegments. It would help stakeholders understand the competitive landscape and gain more insights better to position their business and plan suitable go-to-market strategies. It also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (Growing demand for intelligent and autonomous systems for a personalized experience, increasing advancements in AI and ML technologies for better and smart decisions, the proliferation of connected devices and IoT ecosystem for effective communications, rising usage of embedded AI for industry-specific applications), restraints (Concerns related to data privacy and security, shortage of skilled and talented workforce), opportunities (Rise in demand for more powerful and energy-efficient processors to effectively handle complex AI algorithms, integration with cloud-based AI services for better scalability), and challenges (Inadequate computational resources and model optimization, high infrastructure costs with lower ROI).

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the Embedded AI market

- Market Development: Comprehensive information about lucrative markets - the report analyses the Embedded AI market across varied regions

- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the Embedded AI market

- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Google (US), IBM (US), Microsoft (US), AWS (US), NVIDIA (US), Intel (US), Qualcomm (US), Arm (UK), AMD (US), MediaTek

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

(Taiwan), Oracle (US), among others in the Embedded AI market strategies. The report also helps stakeholders understand the pulse of the Embedded AI market and provides them with information on key market drivers, restraints, challenges, and opportunities.

Table of Contents:

1 INTRODUCTION 41

1.1 STUDY OBJECTIVES 41

1.2 MARKET DEFINITION 41

1.2.1 INCLUSIONS AND EXCLUSIONS 42

1.3 MARKET SCOPE 43

1.3.1 MARKET SEGMENTATION 43

1.3.2 REGIONS COVERED 44

1.3.3 YEARS CONSIDERED 44

1.4 CURRENCY CONSIDERED 44

1.5 STAKEHOLDERS 45

2 RESEARCH METHODOLOGY 46

2.1 RESEARCH DATA 46

FIGURE 1 EMBEDDED AI MARKET: RESEARCH DESIGN 46

2.1.1 SECONDARY DATA 47

2.1.2 PRIMARY DATA 47

2.1.2.1 List of key primary interview participants 47

2.1.2.2 Breakdown of primary profiles 48

FIGURE 2 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION 48

2.1.2.3 Key insights from industry experts 48

2.2 DATA TRIANGULATION AND MARKET BREAKUP 49

FIGURE 3 DATA TRIANGULATION 49

2.3 MARKET SIZE ESTIMATION 50

FIGURE 4 EMBEDDED AI MARKET: TOP-DOWN AND BOTTOM-UP APPROACHES 50

2.3.1 TOP-DOWN APPROACH 50

2.3.2 BOTTOM-UP APPROACH 51

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY - APPROACH 1 (SUPPLY-SIDE): REVENUE FROM SOLUTIONS/SERVICES OF EMBEDDED AI MARKET 51

FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY-APPROACH 2, BOTTOM-UP (SUPPLY-SIDE): COLLECTIVE REVENUE FROM ALL SOLUTIONS/SERVICES OF EMBEDDED AI MARKET 52

FIGURE 7 MARKET SIZE ESTIMATION METHODOLOGY-APPROACH 3, BOTTOM-UP (SUPPLY-SIDE): COLLECTIVE REVENUE FROM ALL SOLUTIONS/SERVICES OF EMBEDDED AI MARKET 53

FIGURE 8 MARKET SIZE ESTIMATION METHODOLOGY-APPROACH 4, BOTTOM-UP (DEMAND-SIDE): SHARE OF EMBEDDED AI THROUGH OVERALL EMBEDDED AI SPENDING 54

2.4 MARKET FORECAST 55

TABLE 1 FACTOR ANALYSIS 55

?

2.5 ASSUMPTIONS 56

TABLE 2 ASSUMPTIONS 56

2.6 LIMITATIONS 57

2.7 RECESSION IMPACT ANALYSIS 58

TABLE 3 IMPACT OF RECESSION ON GLOBAL EMBEDDED AI MARKET 58

3 EXECUTIVE SUMMARY 60

TABLE 4	GLOBAL EMBEDDED AI MARKET SIZE AND GROWTH RATE, 2017-2022 (USD MILLION, Y-O-Y %)	61
TABLE 5	GLOBAL EMBEDDED AI MARKET SIZE AND GROWTH RATE, 2023-2028 (USD MILLION, Y-O-Y %)	62
FIGURE 9	HARDWARE SEGMENT TO DOMINATE MARKET IN 2023	62
FIGURE 10	EDGE COMPUTING PLATFORMS SEGMENT TO HOLD LARGEST MARKET SHARE IN 2023	62
FIGURE 11	PROCESSORS SEGMENT TO HOLD LARGEST MARKET SIZE IN 2023	63
FIGURE 12	SYSTEM INTEGRATION & IMPLEMENTATION SEGMENT TO HOLD LARGEST MARKET SHARE IN 2023	63
FIGURE 13	NUMERIC DATA SEGMENT TO HOLD LARGEST MARKET SIZE IN 2023	63
FIGURE 14	HEALTHCARE & LIFE SCIENCES SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	64
FIGURE 15	NORTH AMERICA TO HOLD LARGEST MARKET SHARE AND ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	64
4	PREMIUM INSIGHTS	65
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN EMBEDDED AI MARKET	65
FIGURE 16	PROLIFERATION OF CONNECTED DEVICES AND IOT ECOSYSTEM FOR EFFECTIVE COMMUNICATIONS TO DRIVE MARKET GROWTH	65
4.2	OVERVIEW OF RECESSION IN GLOBAL EMBEDDED AI MARKET	66
FIGURE 17	EMBEDDED AI MARKET TO WITNESS MINOR DECLINE IN Y-O-Y GROWTH IN 2023	66
4.3	EMBEDDED AI MARKET: TOP THREE DATA TYPES	66
FIGURE 18	NUMERIC DATA SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	66
4.4	NORTH AMERICA: EMBEDDED AI MARKET, BY OFFERING AND TOP THREE VERTICALS	67
FIGURE 19	HARDWARE SEGMENT AND AUTOMOTIVE SEGMENT TO HOLD LARGEST MARKET SHARES IN NORTH AMERICA IN 2023	67
4.5	EMBEDDED AI MARKET: BY REGION	67
FIGURE 20	NORTH AMERICA TO HOLD LARGEST MARKET SHARE IN 2023	67
5	MARKET OVERVIEW AND INDUSTRY TRENDS	68
5.1	INTRODUCTION	68
5.2	MARKET DYNAMICS	68
FIGURE 21	DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES: EMBEDDED AI MARKET	69
5.2.1	DRIVERS	69
5.2.1.1	Growing demand for intelligent and autonomous systems	69
5.2.1.2	Increasing advancements in AI and ML technologies for better and smart decisions	70
5.2.1.3	Proliferation of connected devices and IoT ecosystem for effective communications	70
5.2.1.4	Rising use of embedded AI for industry-specific applications	71
5.2.2	RESTRAINTS	71
5.2.2.1	Data privacy and security concerns	71
5.2.2.2	Shortage of skilled and talented workforce	72
5.2.3	OPPORTUNITIES	72
5.2.3.1	Rising demand for more powerful and energy-efficient processors	72
5.2.3.2	Integration with cloud-based AI services for better scalability	73
5.2.4	CHALLENGES	73
5.2.4.1	Inadequate computational resources and model optimization	73
5.2.4.2	High infrastructure costs with lower ROI	74
5.3	CASE STUDY ANALYSIS	74
5.3.1	CASE STUDY 1: EDGE IMPULSE HELPED OURA RING PROVIDE ENHANCED ANALYSIS OF SLEEP PATTERNS AND USER READINESS	74
5.3.2	CASE STUDY 2: NVIDIA JETSON TX2 NX OFFERED ACCURATE FALL DETECTION BY DEPLOYING NOVI SMART LAMP	75
5.3.3	CASE STUDY 3: ROLLOOS ACTIVELY MONITORED RED ZONES IN REAL TIME BY DEPLOYING NVIDIA'S ACCELERATION TOOLKITS	75
5.3.4	CASE STUDY 4: MERCEDES-BENZ CONSULTING OPTIMIZED DEALERSHIP LAYOUT USING MODCAM STORE ANALYTICS	76

5.3.5	CASE STUDY 5: TVGH ACHIEVED REAL-TIME AI INFERENCE BY UTILIZING AETINA EDGE AI STARTER PACKAGE	76
5.4	TARIFF AND REGULATORY LANDSCAPE	77
5.4.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	77
5.4.2	NORTH AMERICA	77
TABLE 6	NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	77
5.4.3	EUROPE	78
TABLE 7	EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	78
5.4.4	ASIA PACIFIC	78
TABLE 8	ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	78
5.4.5	MIDDLE EAST & AFRICA	79
TABLE 9	MIDDLE EAST & AFRICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	79
5.4.6	LATIN AMERICA	79
TABLE 10	LATIN AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	79
5.5	ECOSYSTEM	80
FIGURE 22	EMBEDDED AI MARKET: ECOSYSTEM	80
?		
5.6	PATENT ANALYSIS	80
5.6.1	METHODOLOGY	80
5.6.2	PATENTS FILED, BY DOCUMENT TYPE, 2013-2023	80
TABLE 11	PATENTS FILED, 2013-2023	80
5.6.3	INNOVATION AND PATENT APPLICATIONS	81
FIGURE 23	TOTAL NUMBER OF PATENTS GRANTED, 2013-2023	81
5.6.3.1	Top applicants	81
FIGURE 24	TOP TEN COMPANIES WITH HIGHEST NUMBER OF PATENT APPLICATIONS IN LAST TEN YEARS, 2013-2023	81
TABLE 12	TOP TWENTY PATENT OWNERS IN EMBEDDED AI MARKET, 2013-2023	82
TABLE 13	LIST OF PATENTS IN EMBEDDED AI MARKET, 2023	83
FIGURE 25	REGIONAL ANALYSIS OF PATENTS GRANTED FOR EMBEDDED AI MARKET, 2023	85
5.7	SUPPLY CHAIN ANALYSIS	86
FIGURE 26	EMBEDDED AI MARKET: SUPPLY CHAIN ANALYSIS	86
TABLE 14	EMBEDDED AI MARKET: SUPPLY CHAIN ANALYSIS	87
5.8	FUTURE DIRECTIONS OF EMBEDDED AI MARKET LANDSCAPE	88
5.8.1	TECHNOLOGY ROADMAP FOR EMBEDDED AI MARKET UNTIL 2030	88
FIGURE 27	EMBEDDED AI ROADMAP UNTIL 2030	88
5.9	PRICING ANALYSIS	89
TABLE 15	AVERAGE SELLING PRICE ANALYSIS, BY OFFERING	90
5.10	KEY COMPONENTS OF EMBEDDED AI ARCHITECTURE	91
FIGURE 28	EMBEDDED AI ARCHITECTURE	91
5.10.1	MODEL MODULE	91
5.10.2	DATA MODULE	91
5.10.3	COMPUTING POWER MODULE	92
5.11	BRIEF HISTORY OF EMBEDDED AI/EVOLUTION	92
FIGURE 29	EMBEDDED AI MARKET EVOLUTION	92
5.12	TRENDS AND DISRUPTIONS IMPACTING BUYERS/CLIENTS' BUSINESSES	93
FIGURE 30	EMBEDDED AI MARKET: TRENDS AND DISRUPTIONS IMPACTING BUYERS/CLIENTS' BUSINESSES	93
5.13	PORTER'S FIVE FORCES ANALYSIS	94
FIGURE 31	EMBEDDED AI MARKET: PORTER'S FIVE FORCES ANALYSIS	94
5.13.1	THREAT OF NEW ENTRANTS	94

5.13.2	THREAT OF SUBSTITUTES	95
5.13.3	BARGAINING POWER OF SUPPLIERS	95
5.13.4	BARGAINING POWER OF BUYERS	95
5.13.5	INTENSITY OF COMPETITIVE RIVALRY	95
5.14	KEY CONFERENCES AND EVENTS, 2023-2024	96
TABLE 16 EMBEDDED AI MARKET: DETAILED LIST OF CONFERENCES AND EVENTS, 2023-2024		96
?		
5.15	KEY STAKEHOLDERS AND BUYING CRITERIA	97
5.15.1	KEY STAKEHOLDERS IN BUYING PROCESS	97
FIGURE 32 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE APPLICATIONS		97
TABLE 17 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE APPLICATIONS		97
5.15.2	BUYING CRITERIA	98
FIGURE 33 KEY BUYING CRITERIA FOR TOP THREE APPLICATIONS		98
TABLE 18 KEY BUYING CRITERIA FOR TOP THREE APPLICATIONS		98
5.16	TECHNOLOGY ANALYSIS	98
5.16.1	KEY TECHNOLOGY	99
5.16.1.1	ML and Deep Learning	99
5.16.1.2	Data Science	99
5.16.1.3	Edge Computing	99
5.16.1.4	IoT	100
5.16.1.5	Computer Vision	100
5.16.1.6	Neural Networks	100
5.16.1.7	TensorFlow Lite	101
5.16.2	ADJACENT TECHNOLOGY	101
5.16.2.1	Signal Processing	101
5.16.2.2	Data Mining and Predictive Analysis	101
5.16.2.3	Blockchain	102
5.16.2.4	5G	102
5.17	IMPACT OF EMBEDDED AI ON BUSINESS MODERNIZATION	103
5.17.1	BUSINESS PROCESS AND TASK AUTOMATION	103
5.17.2	ADVANCED PREDICTIVE ANALYTICS	103
5.17.3	INTELLIGENT DECISION-MAKING	104
5.17.4	STREAMLINED CUSTOMER EXPERIENCE	104
5.18	BUSINESS MODEL ANALYSIS	105
FIGURE 34 EMBEDDED AI MARKET: BUSINESS MODELS		105
5.18.1	BUSINESS MODELS FOR HARDWARE VENDORS	105
5.18.2	BUSINESS MODELS FOR SOFTWARE PROVIDERS	106
5.18.3	BUSINESS MODELS FOR SERVICE PROVIDERS	106
6	EMBEDDED AI MARKET, BY OFFERING	107
6.1	INTRODUCTION	108
6.1.1	OFFERING: EMBEDDED AI MARKET DRIVERS	108
FIGURE 35 SOFTWARE SEGMENT TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD		108
TABLE 19 EMBEDDED AI MARKET, BY OFFERING, 2017-2022 (USD MILLION)		109
TABLE 20 EMBEDDED AI MARKET, BY OFFERING, 2023-2028 (USD MILLION)		109
?		
6.2	HARDWARE	109
FIGURE 36 AI ACCELERATORS SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD		110

TABLE 21	EMBEDDED AI MARKET, BY HARDWARE, 2017-2022 (USD MILLION)	110
TABLE 22	EMBEDDED AI MARKET, BY HARDWARE, 2023-2028 (USD MILLION)	110
6.2.1	PROCESSORS	111
TABLE 23	PROCESSORS: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	111
TABLE 24	PROCESSORS: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	111
6.2.1.1	GPUs	112
6.2.1.1.1	Exceptional computational power and parallel processing capabilities to propel demand for GPUs	112
6.2.1.2	FPGAs	112
6.2.1.2.1	Need for flexibility to effortlessly program and reconfigure to drive demand for FPGAs	112
6.2.1.3	NPUs	113
6.2.1.3.1	Need for optimized architectures and parallel processing to provide exceptional performance per watt to boost demand for NPUs	113
6.2.1.4	Other processors	113
6.2.2	MEMORY UNITS	114
TABLE 25	MEMORY UNITS: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	114
TABLE 26	MEMORY UNITS: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	114
6.2.2.1	Random Access Memory (RAM)	115
6.2.2.1.1	Need for faster data access and quick analysis and response within device to drive demand for RAM	115
6.2.2.2	Flash Memory	115
6.2.2.2.1	Need to process data locally, reduce constant connectivity, and enable real-time decision-making to boost demand for flash memory	115
6.2.2.3	ROM	116
6.2.2.3.1	Need to preserve authenticity of critical software components and cost-effective storage solution to drive demand for ROM	116
6.2.2.4	Other memory units	116
6.2.3	AI ACCELERATORS	117
TABLE 27	AI ACCELERATORS: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	117
TABLE 28	AI ACCELERATORS: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	117
6.2.3.1	Tensor Processing Units (TPUs)	118
6.2.3.1.1	TPUs to optimize large-scale neural network processing and matrix operations and offer faster inference and training times	118
6.2.3.2	Neural Network Accelerators	118
6.2.3.2.1	Neural network accelerators to perform AI tasks with less power by transferring computational load from general-purpose processors to dedicated AI chips	118
6.2.4	OTHER HARDWARE	118
TABLE 29	OTHER HARDWARE: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	119
TABLE 30	OTHER HARDWARE: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	119
6.3	SOFTWARE	119
FIGURE 37	AI MIDDLEWARE SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	120
TABLE 31	EMBEDDED AI MARKET, BY SOFTWARE, 2017-2022 (USD MILLION)	120
TABLE 32	EMBEDDED AI MARKET, BY SOFTWARE, 2023-2028 (USD MILLION)	120
6.3.1	AI MIDDLEWARE	121
6.3.1.1	AI Middleware to offer tools and frameworks for efficient model management and inference at edge	121
TABLE 33	AI MIDDLEWARE: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	121
TABLE 34	AI MIDDLEWARE: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	121
6.3.2	AI & ML FRAMEWORKS	122
6.3.2.1	Need for model optimization and integration of AI frameworks with edge computing architectures to drive market	122

TABLE 35	AI & ML FRAMEWORKS: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	122
TABLE 36	AI & ML FRAMEWORKS: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	123
6.3.3	EDGE COMPUTING PLATFORMS	123
6.3.3.1	Edge computing platforms to support edge AI applications, simplify data processing and analytics, and seamlessly integrate with edge devices	123
TABLE 37	EDGE COMPUTING PLATFORMS: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	124
TABLE 38	EDGE COMPUTING PLATFORMS: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	124
6.3.4	OTHER SOFTWARE	124
TABLE 39	OTHER SOFTWARE: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	125
TABLE 40	OTHER SOFTWARE: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	125
6.4	SERVICES	125
FIGURE 38	TRAINING & CONSULTING SERVICES SEGMENT TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD	126
TABLE 41	SERVICES: EMBEDDED AI MARKET, BY TYPE, 2017-2022 (USD MILLION)	126
TABLE 42	SERVICES: EMBEDDED AI MARKET, BY TYPE, 2023-2028 (USD MILLION)	126
?		
6.4.1	TRAINING & CONSULTING	127
6.4.1.1	Training & consulting services to play vital role in managing operations and technological updates	127
TABLE 43	TRAINING & CONSULTING: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	127
TABLE 44	TRAINING & CONSULTING: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	127
6.4.2	SYSTEM INTEGRATION & IMPLEMENTATION	128
6.4.2.1	System integration & implementation services to gain traction to ensure effective system communication	128
TABLE 45	SYSTEM INTEGRATION & IMPLEMENTATION: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	128
TABLE 46	SYSTEM INTEGRATION & IMPLEMENTATION: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	128
6.4.3	SUPPORT & MAINTENANCE	129
6.4.3.1	Rising demand for support & maintenance services to ensure optimal performance	129
TABLE 47	SUPPORT & MAINTENANCE: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	129
TABLE 48	SUPPORT & MAINTENANCE: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	129
7	EMBEDDED AI MARKET, BY DATA TYPE	130
7.1	INTRODUCTION	131
7.1.1	DATA TYPE: EMBEDDED AI MARKET DRIVERS	131
FIGURE 39	NUMERIC DATA SEGMENT TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD	131
TABLE 49	EMBEDDED AI MARKET, BY DATA TYPE, 2017-2022 (USD MILLION)	132
TABLE 50	EMBEDDED AI MARKET, BY DATA TYPE, 2023-2028 (USD MILLION)	132
7.2	SENSOR DATA	132
7.2.1	COMBINATION OF EMBEDDED AI AND EDGE AI TO FUEL GROWTH OF SENSOR DATA	132
TABLE 51	SENSOR DATA: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	133
TABLE 52	SENSOR DATA: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	133
7.3	IMAGE & VIDEO DATA	133
7.3.1	INCREASING AVAILABILITY AND AFFORDABILITY OF CAMERAS AND CONSUMPTION OF VISUAL CONTENT TO DRIVE MARKET	133
TABLE 53	IMAGE & VIDEO DATA: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	134
TABLE 54	IMAGE & VIDEO DATA: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	134
7.4	NUMERIC DATA	134
7.4.1	PROLIFERATION OF SENSORS AND CONNECTED DEVICES TO DRIVE DEMAND FOR NUMERIC DATA	134
TABLE 55	NUMERIC DATA: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	135
TABLE 56	NUMERIC DATA: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	135
7.5	CATEGORICAL DATA	136
7.5.1	NEED TO DETECT AND CLASSIFY OBJECTS, RECOGNIZE GESTURES, AND IDENTIFY SPECIFIC PATTERNS TO DRIVE MARKET	136

TABLE 57	CATEGORICAL DATA: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	136
TABLE 58	CATEGORICAL DATA: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	136
7.6	OTHER DATA TYPES	137
TABLE 59	OTHER DATA TYPES: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	137
TABLE 60	OTHER DATA TYPES: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	137
8	EMBEDDED AI MARKET, BY VERTICAL	138
8.1	INTRODUCTION	139
8.1.1	VERTICAL: EMBEDDED AI MARKET DRIVERS	139
FIGURE 40	HEALTHCARE & LIFE SCIENCES VERTICAL TO WITNESS HIGHEST GROWTH RATE DURING FORECAST PERIOD	140
TABLE 61	EMBEDDED AI MARKET, BY VERTICAL, 2017-2022 (USD MILLION)	140
TABLE 62	EMBEDDED AI MARKET, BY VERTICAL, 2023-2028 (USD MILLION)	141
8.2	BANKING, FINANCIAL SERVICES, AND INSURANCE	141
TABLE 63	BANKING, FINANCIAL SERVICES, AND INSURANCE: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	141
TABLE 64	BANKING, FINANCIAL SERVICES, AND INSURANCE: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	142
8.2.1	FRAUD DETECTION & PREVENTION	142
8.2.1.1	Need to detect and mitigate fraudulent activities and safeguard financial institutions to drive market	142
8.2.2	RISK MANAGEMENT	142
8.2.2.1	Embedded AI to analyze transactional data in real time, enabling accurate risk identification and fraud prevention	142
8.2.3	CUSTOMER SERVICE	143
8.2.3.1	Embedded AI to create virtual assistants or chatbots for automated customer support	143
8.2.4	COMPLIANCE & REGULATORY REPORTING	143
8.2.4.1	Embedded AI to streamline reporting process, reduce human error, and ensure accurate and timely submission of reports	143
8.2.5	OTHER BANKING, FINANCIAL SERVICES, AND INSURANCE TYPES	143
8.3	IT & ITES	144
TABLE 65	IT & ITES: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	144
TABLE 66	IT & ITES: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	144
8.3.1	INTELLIGENT AUTOMATION	145
8.3.1.1	Intelligent automation to provide automated responses by utilizing pre-defined templates or accessing knowledge base	145
8.3.2	CYBERSECURITY	145
8.3.2.1	Incorporation of embedded AI into cybersecurity measures to help IT companies detect and respond to cyber threats effectively	145
8.3.3	CUSTOMER SERVICE	146
8.3.3.1	Embedded AI to analyze customer sentiment by assessing tone and context of customer interactions	146
8.3.4	PREDICTIVE ANALYTICS	146
8.3.4.1	Need to monitor and analyze data points and raise alerts and notifications to drive demand for embedded AI in proactive analytics	146
8.3.5	SUPPLY CHAIN MANAGEMENT	147
8.3.5.1	Need to manage inventory, reduce excess stock, and ensure timely replenishment to drive demand for embedded AI in supply chain management	147
8.4	RETAIL & ECOMMERCE	147
TABLE 67	RETAIL & ECOMMERCE: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	147
TABLE 68	RETAIL & ECOMMERCE: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	148
8.4.1	PERSONALIZED RECOMMENDATIONS	148
8.4.1.1	Utilization of embedded AI in personalized recommendations to improve customer experience and drive sales	148
8.4.2	INVENTORY MANAGEMENT	148
8.4.2.1	Embedded AI to automate tasks and provide intelligent insights in inventory management	148

8.4.3	PRICING OPTIMIZATION	149
8.4.3.1	Embedded AI to automate pricing optimization process and predict customer demand and price elasticity accurately	149
8.4.4	FRAUD DETECTION & PREVENTION	149
8.4.4.1	Embedded AI to detect fraud in real time and provide comprehensive view of customer activities	149
8.4.5	OTHER RETAIL & ECOMMERCE TYPES	149
8.5	MANUFACTURING	150
TABLE 69	MANUFACTURING: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	150
TABLE 70	MANUFACTURING: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	151
8.5.1	PREDICTIVE MAINTENANCE	151
8.5.1.1	Embedded AI to aid in predictive maintenance by analyzing data and enabling proactive and timely maintenance actions	151
8.5.2	WASTE MANAGEMENT	151
8.5.2.1	Embedded AI to help avoid unplanned downtime and prevent waste generated by faulty machinery	151
8.5.3	AUTOMATION & ROBOTICS	152
8.5.3.1	Embedded AI to aid robots in analyzing data, making decisions, executing tasks faster, and reducing human error	152
8.5.4	QUALITY CONTROL & INSPECTION	152
8.5.4.1	AI technology to enhance quality control and inspection processes	152
8.5.5	PRODUCT DESIGN & OPTIMIZATION	153
8.5.5.1	Embedded AI to provide intelligent insights and optimize product designs before creating physical prototypes	153
8.5.6	OTHER MANUFACTURING TYPES	153
8.6	ENERGY & UTILITIES	154
TABLE 71	ENERGY & UTILITIES: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	154
TABLE 72	ENERGY & UTILITIES: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	154
8.6.1	ENERGY MANAGEMENT	155
8.6.1.1	Embedded AI to monitor, analyze, and control energy use in real time and help prevent grid strain and power outages	155
8.6.2	PREDICTIVE MAINTENANCE	155
8.6.2.1	Leveraging AI algorithms in predictive maintenance to help determine optimal time for maintenance activities	155
8.6.3	RENEWAL ENERGY OPTIMIZATION	156
8.6.3.1	Embedded AI to analyze historical data, weather patterns, and other relevant factors to forecast energy demand accurately	156
8.6.4	OTHER ENERGY & UTILITIES TYPES	156
8.7	TRANSPORTATION & LOGISTICS	157
TABLE 73	TRANSPORTATION & LOGISTICS: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	157
TABLE 74	TRANSPORTATION & LOGISTICS: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	157
8.7.1	ROUTE OPTIMIZATION	158
8.7.1.1	Embedded AI to help monitor real-time data and minimize travel time and fuel consumption	158
8.7.2	INVENTORY MANAGEMENT	158
8.7.2.1	Need to improve operational efficiency and analyze historical data and market trends to drive demand for embedded AI in inventory management	158
8.7.3	AUTONOMOUS VEHICLES	158
8.7.3.1	Embedded AI to optimize routes, make real-time adjustments, and reduce fuel consumption	158
8.7.4	FREIGHT MANAGEMENT	159
8.7.4.1	Embedded AI to facilitate real-time monitoring of freight shipments and improve operational efficiency	159
8.7.5	OTHER TRANSPORTATION & LOGISTICS TYPES	159
8.8	HEALTHCARE & LIFE SCIENCES	160
TABLE 75	HEALTHCARE & LIFE SCIENCES: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)	160
TABLE 76	HEALTHCARE & LIFE SCIENCES: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)	160

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

8.8.1	MEDICAL DIAGNOSIS	161
8.8.1.1	Embedded AI to analyze vast amounts of patient data and aid in accurate diagnosis and treatment planning	161
	?	
8.8.2	DRUG DISCOVERY	161
8.8.2.1	Embedded AI to accelerate and optimize drug discovery and analyze vast amounts of drugs to identify potential drug targets	161
8.8.3	PERSONALIZED MEDICINE	162
8.8.3.1	Embedded AI to interpret genomic data, predict disease risk, and provide personalized diagnostic recommendations	162
8.8.4	REMOTE PATIENT MONITORING	162
8.8.4.1	RPM empowered by embedded AI to monitor patients' health conditions and collect real-time data	162
8.8.5	OTHER HEALTHCARE & LIFE SCIENCES TYPES	162
8.9	MEDIA & ENTERTAINMENT	163
TABLE 77 MEDIA & ENTERTAINMENT: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)		163
TABLE 78 MEDIA & ENTERTAINMENT: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)		164
8.9.1	CONTENT CREATION	164
8.9.1.1	Embedded AI to transform content creation, provide innovative tools, and improve quality, efficiency, and personalization of media experiences	164
8.9.2	CONTENT ANALYTICS	164
8.9.2.1	Embedded AI to automate content analytics by analyzing and comprehending extensive volumes of media content	164
8.9.3	AR & VR	165
8.9.3.1	AR and VR technologies to revolutionize Media & Entertainment industry by providing enhanced user experiences	165
8.9.4	OTHER MEDIA & ENTERTAINMENT TYPES	165
8.10	TELECOM	166
TABLE 79 TELECOM: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)		166
TABLE 80 TELECOM: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)		166
8.10.1	NETWORK OPTIMIZATION	167
8.10.1.1	Embedded AI to analyze network traffic patterns in real time, reduce latency, and improve network responsiveness	167
8.10.2	NETWORK SECURITY	167
8.10.2.1	Embedded AI to process and understand unstructured data and monitor network traffic and identify abnormal patterns	167
8.10.3	QUERY MANAGEMENT	167
8.10.3.1	Telecom providers to leverage AI capabilities to deliver personalized, efficient, and proactive customer support	167
8.10.4	FRAUD DETECTION & PREVENTION	168
8.10.4.1	Embedded AI to help telecom companies proactively update fraud prevention strategies by analyzing vast amounts of data	168
8.10.5	OTHER TELECOM TYPES	168
	?	
8.11	AUTOMOTIVE	169
TABLE 81 AUTOMOTIVE: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION)		169
TABLE 82 AUTOMOTIVE: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION)		170
8.11.1	SELF DRIVING CARS	170
8.11.1.1	Embedded AI technology to analyze traffic patterns, road rules, and situational factors	170
8.11.2	FLEET MANAGEMENT	170
8.11.2.1	Embedded AI to help in tracking and monitoring vehicles in real time and intelligent decision-making	170
8.11.3	ENERGY EFFICIENCY & EMISSIONS CONTROL	171
8.11.3.1	Embedded AI to optimize power distribution and overall energy consumption and improve battery utilization	171
8.11.4	VEHICLE INFOTAINMENT	171
8.11.4.1	Embedded AI incorporated with NLP to enable natural language commands and provide connected services	171

8.11.5 OTHER AUTOMOTIVE TYPES 172

8.12 OTHER VERTICALS 172

TABLE 83 OTHER VERTICALS: EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION) 174

TABLE 84 OTHER VERTICALS: EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION) 174

9 EMBEDDED AI MARKET, BY REGION 175

9.1 INTRODUCTION 176

FIGURE 41 ASIA PACIFIC TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD 176

FIGURE 42 INDIA TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD 177

TABLE 85 EMBEDDED AI MARKET, BY REGION, 2017-2022 (USD MILLION) 177

TABLE 86 EMBEDDED AI MARKET, BY REGION, 2023-2028 (USD MILLION) 177

9.2 NORTH AMERICA 178

9.2.1 NORTH AMERICA: EMBEDDED AI MARKET DRIVERS 178

9.2.2 NORTH AMERICA: RECESSION IMPACT 178

FIGURE 43 NORTH AMERICA: MARKET SNAPSHOT 179

TABLE 87 NORTH AMERICA: EMBEDDED AI MARKET, BY OFFERING, 2017-2022 (USD MILLION) 179

TABLE 88 NORTH AMERICA: EMBEDDED AI MARKET, BY OFFERING, 2023-2028 (USD MILLION) 180

TABLE 89 NORTH AMERICA: EMBEDDED AI MARKET, BY HARDWARE, 2017-2022 (USD MILLION) 180

TABLE 90 NORTH AMERICA: EMBEDDED AI MARKET, BY HARDWARE, 2023-2028 (USD MILLION) 180

TABLE 91 NORTH AMERICA: EMBEDDED AI MARKET, BY SOFTWARE, 2017-2022 (USD MILLION) 180

TABLE 92 NORTH AMERICA: EMBEDDED AI MARKET, BY SOFTWARE, 2023-2028 (USD MILLION) 181

TABLE 93 NORTH AMERICA: EMBEDDED AI MARKET, BY SERVICE, 2017-2022 (USD MILLION) 181

TABLE 94 NORTH AMERICA: EMBEDDED AI MARKET, BY SERVICE, 2023-2028 (USD MILLION) 181

TABLE 95 NORTH AMERICA: EMBEDDED AI MARKET, BY DATA TYPE, 2017-2022 (USD MILLION) 181

TABLE 96 NORTH AMERICA: EMBEDDED AI MARKET, BY DATA TYPE, 2023-2028 (USD MILLION) 182

TABLE 97 NORTH AMERICA: EMBEDDED AI MARKET, BY VERTICAL, 2017-2022 (USD MILLION) 182

TABLE 98 NORTH AMERICA: EMBEDDED AI MARKET, BY VERTICAL, 2023-2028 (USD MILLION) 183

TABLE 99 NORTH AMERICA: EMBEDDED AI MARKET, BY COUNTRY, 2017-2022 (USD MILLION) 183

TABLE 100 NORTH AMERICA: EMBEDDED AI MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 183

9.2.3 US 184

9.2.3.1 Rising technological advancements and deals focusing on AI development to drive market 184

9.2.4 CANADA 184

9.2.4.1 Strong tech ecosystem, presence of numerous startups, and supportive government initiatives to drive market 184

9.3 EUROPE 185

9.3.1 EUROPE: EMBEDDED AI MARKET DRIVERS 185

9.3.2 EUROPE: RECESSION IMPACT 186

TABLE 101 EUROPE: EMBEDDED AI MARKET, BY OFFERING, 2017-2022 (USD MILLION) 186

TABLE 102 EUROPE: EMBEDDED AI MARKET, BY OFFERING, 2023-2028 (USD MILLION) 187

TABLE 103 EUROPE: EMBEDDED AI MARKET, BY HARDWARE, 2017-2022 (USD MILLION) 187

TABLE 104 EUROPE: EMBEDDED AI MARKET, BY HARDWARE, 2023-2028 (USD MILLION) 187

TABLE 105 EUROPE: EMBEDDED AI MARKET, BY SOFTWARE, 2017-2022 (USD MILLION) 187

TABLE 106 EUROPE: EMBEDDED AI MARKET, BY SOFTWARE, 2023-2028 (USD MILLION) 188

TABLE 107 EUROPE: EMBEDDED AI MARKET, BY SERVICE, 2017-2022 (USD MILLION) 188

TABLE 108 EUROPE: EMBEDDED AI MARKET, BY SERVICE, 2023-2028 (USD MILLION) 188

TABLE 109 EUROPE: EMBEDDED AI MARKET, BY DATA TYPE, 2017-2022 (USD MILLION) 188

TABLE 110 EUROPE: EMBEDDED AI MARKET, BY DATA TYPE, 2023-2028 (USD MILLION) 189

TABLE 111 EUROPE: EMBEDDED AI MARKET, BY VERTICAL, 2017-2022 (USD MILLION) 189

TABLE 112 EUROPE: EMBEDDED AI MARKET, BY VERTICAL, 2023-2028 (USD MILLION) 190

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 113 EUROPE: EMBEDDED AI MARKET, BY COUNTRY, 2017-2022 (USD MILLION) 190

TABLE 114 EUROPE: EMBEDDED AI MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 190

9.3.3 UK 191

9.3.3.1 Growing demand for interconnected devices and focus on developing cutting-edge technologies to drive market 191
?

9.3.4 GERMANY 191

9.3.4.1 Acquisitions and partnerships between major companies to develop intelligent devices to propel demand for embedded AI 191

9.3.5 FRANCE 192

9.3.5.1 Focus of STMicroelectronics on developing cutting-edge embedded AI solutions to drive market 192

9.3.6 ITALY 192

9.3.6.1 Integration of edge computing and AI capabilities and rising demand from healthcare sector to drive market 192

9.3.7 SPAIN 193

9.3.7.1 Establishment of BSC as European AI-on-demand platform to drive market 193

9.3.8 REST OF EUROPE 193

9.4 ASIA PACIFIC 194

9.4.1 ASIA PACIFIC: EMBEDDED AI MARKET DRIVERS 194

9.4.2 ASIA PACIFIC: RECESSION IMPACT 194

FIGURE 44 ASIA PACIFIC: MARKET SNAPSHOT 195

TABLE 115 ASIA PACIFIC: EMBEDDED AI MARKET, BY OFFERING, 2017-2022 (USD MILLION) 196

TABLE 116 ASIA PACIFIC: EMBEDDED AI MARKET, BY OFFERING, 2023-2028 (USD MILLION) 196

TABLE 117 ASIA PACIFIC: EMBEDDED AI MARKET, BY HARDWARE, 2017-2022 (USD MILLION) 196

TABLE 118 ASIA PACIFIC: EMBEDDED AI MARKET, BY HARDWARE, 2023-2028 (USD MILLION) 196

TABLE 119 ASIA PACIFIC: EMBEDDED AI MARKET, BY SOFTWARE, 2017-2022 (USD MILLION) 197

TABLE 120 ASIA PACIFIC: EMBEDDED AI MARKET, BY SOFTWARE, 2023-2028 (USD MILLION) 197

TABLE 121 ASIA PACIFIC: EMBEDDED AI MARKET, BY SERVICE, 2017-2022 (USD MILLION) 197

TABLE 122 ASIA PACIFIC: EMBEDDED AI MARKET, BY SERVICE, 2023-2028 (USD MILLION) 197

TABLE 123 ASIA PACIFIC: EMBEDDED AI MARKET, BY DATA TYPE, 2017-2022 (USD MILLION) 198

TABLE 124 ASIA PACIFIC: EMBEDDED AI MARKET, BY DATA TYPE, 2023-2028 (USD MILLION) 198

TABLE 125 ASIA PACIFIC: EMBEDDED AI MARKET, BY VERTICAL, 2017-2022 (USD MILLION) 198

TABLE 126 ASIA PACIFIC: EMBEDDED AI MARKET, BY VERTICAL, 2023-2028 (USD MILLION) 199

TABLE 127 ASIA PACIFIC: EMBEDDED AI MARKET, BY COUNTRY, 2017-2022 (USD MILLION) 199

TABLE 128 ASIA PACIFIC: EMBEDDED AI MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 200

TABLE 129 ASIA PACIFIC: EMBEDDED AI MARKET, BY ASEAN COUNTRY, 2017-2022 (USD MILLION) 200

TABLE 130 ASIA PACIFIC: EMBEDDED AI MARKET, BY ASEAN COUNTRY, 2023-2028 (USD MILLION) 200

9.4.3 CHINA 201

9.4.3.1 Deals between technical giants to create intelligent devices and government initiatives to adopt embedded AI to drive market 201

9.4.4 INDIA 201

9.4.4.1 National AI Strategy to focus on R&D, skilling and reskilling, and establishing AI centers of excellence 201

9.4.5 JAPAN 202

9.4.5.1 Deployment of AI in diverse sectors and presence of companies and startups specialized in embedded AI to drive market 202

9.4.6 ANZ 202

9.4.6.1 Focus on developing cutting-edge AI solutions and attracting investments to drive demand for embedded AI 202

9.4.7 SOUTH KOREA 203

9.4.7.1 Significant strides in AI research, development, and deployment and focus of companies on developing AI devices to drive

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

market203

9.4.8 ASEAN COUNTRIES203

9.4.8.1 Growing digital transformation efforts, expanding technology infrastructure, and increasing demand for AI-enabled applications to drive market203

9.4.9 REST OF ASIA PACIFIC204

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Embedded AI Market by Offering (Hardware, Software, Services), Data Type (Numerical Data, Categorical Data, Image & Video Data), Vertical (Automotive, Manufacturing, Healthcare & Life Sciences, Telecom), and Region - Global Forecast to 2028

Market Report | 2023-06-22 | 319 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

Signature