# Field Programmable Gate Array (FPGA) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 144 pages | Mordor Intelligence

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**Report description:**

Field Programmable Gate Array (FPGA) Market Analysis

The field programmable gate array market was valued at USD 10.08 billion in 2025 and estimated to grow from USD 11.02 billion in 2026 to reach USD 17.23 billion by 2031, at a CAGR of 9.35% during the forecast period (2026-2031). Rapid adoption of edge-AI inference in hyperscale data centers, the migration to 5G open radio architectures, and the rising need for post-deployment reconfigurability in automotive and aerospace electronics gave the market clear momentum. High-end devices continued to anchor revenues, yet mid-range and low-end products climbed quickly as design teams pushed FPGA technology into cost-sensitive industrial, IoT, and consumer systems. Asia-Pacific emerged as both the largest manufacturing base and the fastest-growing demand center, benefiting from electric-vehicle powertrains and new-space constellations. Competitive intensity increased after Intel agreed to carve out Altera, reshaping supplier dynamics while export controls spurred parallel domestic development in China. Tighter 300 mm foundry capacity and the costly transition to ?16 nm nodes also forced vendors to prioritize high-margin applications and long-term wafer reservations with TSMC and Samsung.

Global Field Programmable Gate Array (FPGA) Market Trends and Insights

Edge-AI inference demand in hyperscale data centers

Hyperscale operators deployed FPGAs to accelerate AI inference once latency and power budgets began outweighing raw throughput requirements. AMD's Versal AI Edge Gen 2 devices delivered up to 3 ? higher TOPS-per-watt than first-generation parts,

enabling real-time vision analytics while containing operating expenses. Achronix reported 200 % cost and power advantages versus GPU alternatives when running large language models, underscoring FPGA efficiency in memory-bound workloads. This shift unlocked a distributed compute model where inference processing moved closer to data sources, easing bandwidth constraints and data-sovereignty risks. Integration of on-package HBM and hardened AI engines within leading FPGA families strengthened their position in cloud-edge topologies. Consequently, the field programmable gate array market found a durable growth pillar in hyperscale capital expenditure plans.

5G ORAN shift requiring re-programmable logic in radios

Open radio access network initiatives pushed carriers to adopt vendor-agnostic radio units that could evolve with software upgrades rather than forklift replacements. Intel's Agilex portfolio used 10 nm SuperFin technology to deliver software-defined radios that adapt to new 5G releases at a lower total cost of ownership. Lattice Semiconductor complemented that hardware with a reference stack providing zero-trust security and real-time encryption for disaggregated networks. AMD's Zynq RFSoC DFE doubled performance per watt versus prior devices, letting operators support multi-band operation inside compact, power-constrained radio heads. Flexible logic shortened rollout cycles, a critical factor as carriers blended private-5G, fixed-wireless access, and mmWave services. That flexibility secured a new volume opportunity for the field programmable gate array market across telecom infrastructure.

US-EU export controls on high-performance FPGAs to China

New Bureau of Industry and Security rules removed civilian exemptions for advanced FPGA shipments to China in late 2023, restricting devices suited for AI or military use. The shift forced AMD-Xilinx and Intel-Altera to halt or license-screen many orders, reducing near-term unit volumes. Chinese suppliers such as GOWIN and Pango sought to close the gap, yet hurdles in design tools, IP, and advanced process access limited immediate substitution. Multinational customers moved sensitive production away from China or redesigned systems to qualify non-US devices, fracturing previously global supply chains. The resulting uncertainty weighed on the field programmable gate array market until new trade norms stabilized.

Other drivers and restraints analyzed in the detailed report include:

Rapid prototyping needs for ASIC/SoC shrink cycles (?7 nm)Functional safety compliance in automotive (ISO 26262)Volatility in 300 mm foundry capacity allocation

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

High-end devices held 65.80% of the field programmable gate array market share in 2025, reflecting their central role in data-center acceleration and 5G infrastructure. These platforms, often exceeding 1 million logic cells, carried premium ASPs yet delivered deterministic latency unavailable in GPUs, preserving their appeal for safety-critical aerospace and fintech workloads. Mid-range and low-end devices exhibited an 10.85% CAGR to 2031 as manufacturers like Lattice shipped cost-optimized parts with hardened AI engines that met edge-compute budgets. Design tools have grown more intuitive, letting embedded engineers adopt configurable logic without hardware backgrounds.

The value proposition evolved as AMD introduced Spartan UltraScale+ with 30% lower power and unrivaled I/O count, attacking the mid-range from above. Simultaneously, module vendors supplied pre-validated boards that abstracted pin-planning and PCB layout, trimming design cycles. These shifts are expected to compress the pricing gap between tiers, although high-end devices still command a majority of the field programmable gate array market size when new AI or networking standards emerge that only

top-node silicon can satisfy.

SRAM-based solutions owned 54.85% revenue in 2025 and posted an 11.45% CAGR outlook thanks to unlimited reprogram cycles and a deep software ecosystem. Yet flash-based variants gained mindshare in wearables and automotive telematics, where instant-on behavior is vital. Microchip's RT PolarFire achieved MIL-STD-883 Class B, offering 50% lower power than equivalent SRAM parts while tolerating 100 krad radiation. Anti-fuse platforms sustained a niche in defense avionics where one-time programmability eliminates tampering risk.

Software portability is shrinking historical barriers, so designers can now choose based on power and security rather than tool familiarity. Emerging heterogeneous architectures integrate SRAM fabric with on-die non-volatile domains, providing the best-of-both options. While SRAM devices will continue leading the field programmable gate array market revenue, flash and anti-fuse offerings should carve larger shares in low-power and harsh-environment deployments.

Field Programmable Gate Array is Segmented by Configuration (High-End FPGA, and Mid-range/Low-end FPGA), Architecture (SRAM-Based FPGA, Flash-Based FPGA, and More), Technology Node (?90 Nm, 20-90 Nm, and ?16 Nm), End Market (Data Centre and Cloud Computing, Telecommunications and 5G Infrastructure, Automotive, and More), and Geography (North America, Europe, Asia-Pacific, South America, Middle East and Africa).

Geography Analysis

Asia-Pacific dominated the field programmable gate array market with 39.10% revenue in 2025 and showed a 16.20% CAGR outlook to 2031. China's push for semiconductor self-reliance, highlighted by domestic innovators in electric vehicle drives and satellite payloads, pulled in significant FPGA volumes. Taiwan and South Korea supplied advanced fabrication, while Japan specialized in automotive modules and factory automation subsystems. India's design-service sector advanced after Lattice opened an R&D center in Pune, broadening engineering talent pools.

North America maintained leadership in data-center infrastructure, high-reliability aerospace, and EDA software. Hyperscalers directed large capital budgets toward adaptive accelerators to manage AI service costs, ensuring the region's strong purchase share. Export-license reviews shaped shipment patterns but also prompted domestic investment in advanced packaging and OSAT capacity that supports the field programmable gate array market.

Europe leaned on Germany's automotive supply chain and Nordic telecom equipment providers. ISO 26262 compliance spurred in-vehicle usage, while energy-transition projects created demand for low-loss power converters. EU Digital Decade policies encouraged sovereign edge computing platforms that favor reconfigurability. Although South America and the Middle East, and Africa hold smaller slices today, growth potential in 5G infrastructure and industrial modernization should boost their contribution over the forecast period.

List of Companies Covered in this Report:

Advanced Micro Devices Inc. (Xilinx) Intel Corporation Lattice Semiconductor Corp. Microchip Technology Inc. (Microsemi) Achronix Semiconductor Corp. QuickLogic Corporation Efinix Inc. GOWIN Semiconductor Corp. Flex Logix Technologies Inc. NanoXplore SAS Anlogic Infotech Co. Ltd. Pango Microsystems Inc. Shenzhen S2C Ltd. BittWare (Molex Company) Digilent Inc. AlphaData Parallel Systems Ltd. Colfax International Reflex Ces SAS Aldec Inc. Beijing Tsinghua Tongfang Co. Ltd.

Additional Benefits:

<ul>  The market estimate (ME) sheet in Excel format

3 months of analyst support  </ul>

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