

Global Application-Specific Integrated Circuits (ASIC) for Automobile Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Application-Specific Integrated Circuits (ASIC) for Automobile market size is expected to reach \$ 3862 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Automotive application-specific integrated circuits are a class of specialized chips designed around specific tasks within a vehicle's electrical and electronic architecture and validated to automotive standards. Their core role is to replace dispersed general-purpose device solutions with higher integration, higher reliability, stronger functional-safety capability, and longer supply longevity across cockpit display, body control, zonal gateway, battery management, traction inverter control, thermal management, chassis actuation, in-vehicle communications, and driver-assistance functions. This category includes both custom ASICs and custom SoCs optimized for a single customer or use case, as well as system ICs, driver ICs, sensor-interface ICs, display driver ICs, power-management ICs, network transceivers, and automotive processors that perform clearly defined dedicated functions in vehicle applications. Based on vendor product pages, the mainstream technology trajectory is evolving toward functional safety, AEC-Q100 quality control, zonal architecture and centralized compute, automotive Ethernet and CAN XL communications, multi-display and multi-camera cockpits, high-voltage batteries and 800V electric drivetrains, radar and camera perception, and platformized software compatibility required by software-defined vehicles. Its primary customers are OEMs, Tier 1 suppliers, domain-controller vendors, battery and e-powertrain integrators, and smart-cockpit solution providers. Common delivery models include standard automotive-grade products, platform SoC families, serialized chips for specific vehicle platforms, and custom-development models combining upfront NRE with follow-on mass-production supply. The commercial value lies in helping customers shorten

development cycles, reduce wiring-harness and controller complexity, and achieve a manufacturable system-level optimum across safety, efficiency, user experience, power consumption, wiring complexity, and total vehicle cost.

The evolution of automotive application-specific integrated circuits has moved from functional chips centered on a single actuator, a single ECU, or a single sensor interface toward platform chips aligned with the restructuring of the vehicle's electrical and electronic architecture. As shown by the official product pages of Socionext, Samsung, Intel, and SemiDrive, the center of gravity of automotive chips is shifting from traditional distributed control toward cockpit SoCs, central gateways, zonal controllers, centralized compute, and multi-sensor fusion processing. At the same time, companies such as Bosch, ADI, onsemi, and NXP continue to fill in critical device layers for automotive Ethernet, CAN XL, zonal power distribution, edge nodes, and power control. This means automotive ASICs are no longer merely custom chips for isolated functions. They are increasingly taking on system-level roles across the vehicle, including compute aggregation, network connectivity, power scheduling, data acquisition, and safety execution. For OEMs and Tier 1 suppliers, future chip selection will not be determined only by device parameters, but by whether a supplier can support software reuse, cross-platform vehicle scalability, wiring-harness simplification, controller consolidation, and subsequent OTA upgrades. It will also depend on whether the supplier can deliver a complete package including toolchains, reference designs, functional-safety documentation, and long-term supply commitments. This is the fundamental reason why the value of automotive ASICs continues to rise as software-defined vehicles become the main industry direction, and why competition is shifting from component competition to platform competition.

On the demand side, growth is being driven by the combined resonance of electrification, intelligence, and regulation. In electrification, the official websites of TI, Renesas, ROHM, and onsemi all place battery management, inverters, OBCs, DC-DC conversion, and thermal management at the core of their automotive portfolios, indicating that high-voltage platforms, range pressure, and thermal-safety requirements are continuously increasing the value density of dedicated power, drive, and monitoring chips. In intelligence, pages from Samsung, ST, Chipone, Bosch, and Socionext collectively highlight multi-display cockpits, multi-camera systems, radar, ultrasound, LiDAR, HUD, and in-vehicle connectivity, showing that upgrades in user experience and ADAS penetration are significantly increasing both the quantity and performance requirements for display drivers, sensing interfaces, cockpit processors, and automotive connectivity chips. In regulation, the EU General Safety Regulation has been pushing more ADAS functions into new vehicle requirements since July 2022, while UNECE

R155 and R156 have incorporated vehicle cybersecurity and software-update management into market-access constraints. In China, the 2025 vehicle trade-in policy and intelligent connected vehicle pilot programs are also pushing new vehicles toward higher levels of electronics and intelligence. As a result, the growth of automotive ASICs is not driven by a single technology trend, but by the joint strengthening of policy, vehicle sales, and architecture upgrades. Once combined, these forces will continue to raise the share of automotive chips in single-vehicle BOM value.

In terms of competition, automotive application-specific integrated circuits are forming a market structure in which three forces are developing in parallel. The first consists of traditional automotive semiconductor vendors such as Infineon, Bosch, Renesas, TI, NXP, onsemi, ROHM, and Toshiba, whose strengths lie in quality systems, long-life supply, functional safety, and broad customer coverage. The second consists of platform-oriented compute and connectivity vendors such as Samsung, Intel, Qualcomm, and Socionext, which are better positioned to turn cockpits, in-vehicle connectivity, centralized compute, and software ecosystems into scalable platforms. The third consists of Chinese domestic vendors such as SemiDrive, AutoChips, Chipone, NOVOSENSE, and OmniVision Group, whose opportunity comes mainly from the rapid expansion of China's new energy vehicle and smart cockpit markets, along with local customers' emphasis on supply-chain security, cost, and response speed. From a regional perspective, the supply side is already multipolar across Europe, the United States, Japan, China, and South Korea, while the strongest demand pull remains concentrated in markets such as China and Europe, where electrification and safety regulations are advancing more quickly. As long as vehicle E/E architecture continues upgrading toward centralized and software-defined models, automotive ASIC vendors that can simultaneously satisfy functional safety, cost control, rapid customization, and ecosystem compatibility should remain in a favorable growth track. The future dividing line in the industry will not be compute power alone, but which companies can build a truly repeatable delivery platform across production cadence, validation depth, software adaptation, and customer collaboration.

This report studies the global Application-Specific Integrated Circuits (ASIC) for Automobile production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Application-Specific Integrated Circuits (ASIC) for Automobile and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Application-Specific Integrated Circuits (ASIC) for Automobile that contribute to its

increasing demand across many markets.

Highlights and key features of the study

Global Application-Specific Integrated Circuits (ASIC) for Automobile total production and demand, 2021-2032, (Million Units)

Global Application-Specific Integrated Circuits (ASIC) for Automobile total production value, 2021-2032, (USD Million)

Global Application-Specific Integrated Circuits (ASIC) for Automobile production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Application-Specific Integrated Circuits (ASIC) for Automobile consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Application-Specific Integrated Circuits (ASIC) for Automobile domestic production, consumption, key domestic manufacturers and share

Global Application-Specific Integrated Circuits (ASIC) for Automobile production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Application-Specific Integrated Circuits (ASIC) for Automobile production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Application-Specific Integrated Circuits (ASIC) for Automobile production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Application-Specific Integrated Circuits (ASIC) for Automobile market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Texas Instruments Incorporated, Infineon Technologies AG, STMicroelectronics N.V., Renesas Electronics Corporation, Analog Devices, Inc., NXP Semiconductors N.V., ON Semiconductor Corporation, Qualcomm Incorporated, Intel Corporation, OmniVision Integrated Circuits Group, Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Application-Specific Integrated Circuits (ASIC) for Automobile market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Application-Specific Integrated Circuits (ASIC) for Automobile Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Application-Specific Integrated Circuits (ASIC) for Automobile Market, Segmentation by Type:

Full Custom Design ASIC

Semi-custom Design ASIC (Standard Cell Based ASIC and Gate Array Based ASIC)

Programmable ASIC

Global Application-Specific Integrated Circuits (ASIC) for Automobile Market,

Global Application-Specific Integrated Circuits (ASIC) for Automobile Supply, Demand and Key Producers, 2026-2...

Segmentation by Integration Level:

Interface and Companion IC

Driver and Power IC

Sensor and Signal-Conditioning IC

MCU

Application Processor and SoC

Custom ASIC and Custom SoC

Global Application-Specific Integrated Circuits (ASIC) for Automobile Market, Segmentation by Architecture Position:

Sensor-Side Edge Chip

Actuator-Side Edge Chip

ECU Support Chip

Domain Controller Chip

Zonal and Gateway Backbone Chip

Central Compute and Cockpit Host

Global Application-Specific Integrated Circuits (ASIC) for Automobile Market, Segmentation by Application:

Powertrain and Energy Management

Chassis and Driving Control

Body and Comfort Systems

Cockpit and Human-Machine Interface

ADAS and Environmental Perception

In-Vehicle Communication and Networking

Companies Profiled:

Texas Instruments Incorporated

Infineon Technologies AG

STMicroelectronics N.V.

Renesas Electronics Corporation

Analog Devices, Inc.

NXP Semiconductors N.V.

ON Semiconductor Corporation

Qualcomm Incorporated

Intel Corporation

OmniVision Integrated Circuits Group, Inc.

Robert Bosch GmbH

Melexis NV

Elmos Semiconductor SE

Microchip Technology Incorporated

ROHM Co., Ltd.

Toshiba Corporation

Socionext Inc.

Samsung Electronics Co., Ltd.

Telechips Inc.

AutoChips Inc.

Beijing SemiDrive Technology Corporation

Chipone Technology (Beijing) Co., Ltd.

NOVOSENSE Microelectronics Co., Ltd.

Key Questions Answered:

1. How big is the global Application-Specific Integrated Circuits (ASIC) for Automobile market?
2. What is the demand of the global Application-Specific Integrated Circuits (ASIC) for Automobile market?
3. What is the year over year growth of the global Application-Specific Integrated Circuits (ASIC) for Automobile market?
4. What is the production and production value of the global Application-Specific Integrated Circuits (ASIC) for Automobile market?
5. Who are the key producers in the global Application-Specific Integrated Circuits (ASIC) for Automobile market?
6. What are the growth factors driving the market demand?

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